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
  - <u>Note</u>: 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**.

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| Patient Lists                             |   |                              |            |             |                   |               |      |            |                   |                  |                     |
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| ¬ → My Unit                               |   |                              | -          |             |                   |               |      | Uns<br>Ord |                   |                  |                     |
|   | Patient<br>Locatio A Dept/I   | Patient<br>Roon Name/Age/Sex | Problem    | Coc<br>Stat | MD<br>Notificatic | Prof<br>Char( |      |            | Register<br>Nurse | Patient<br>Class | New MD<br>Consults  |
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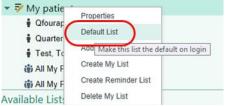
#### Add a Patient to your My Patients List

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 AND assign yourself to the patient's treatment team
  - <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>

| Results of Searching     | Curre  | nt Locatio                               | on for "b | at,jas" 1   | Patient   |                   |     |
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|                          |        |  |           |             | Assign Me<br>End My Ass<br>Assign Other<br>End Others'<br>Treatment T | rs<br>Assignments |     |
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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

<u>Note</u>: 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

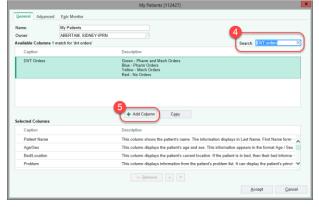


#### Add Column to your My Patients List

- 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

| 👂 Edit List 👻 💉 Sign In 💉 Sign | n In Others 🔌 Sign Out 🙏 Pre-assign 🕘 Pt Location 👻 🌿 W |
|--------------------------------|---|
| My Lists                       | My Patients 3 nts                                       |
| Wy Unit                        | Properties  |
| 🖬 Shared Patient Lists         | Default List Update the settings of the current list Be |
|                                | Add Patient Create My List                              |
| Available Lists                | Create Reminder List                                    |
| Recent Searches                | Delete My List  |
| Dim System Lists               |   |

- 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

| Name:<br>Owner:                 | My Patients<br>ABERTAM, SIDNEY-IPRN |  |                                   |                          |       |
|---------------------------------|-------------------------------------|--|-----------------------------------|--------------------------|-------|
|                                 | matches for 'dvt orders'            |  | Se                                | arch: DVT orders         |       |
| Caption                         |                                     | Description  |                                   |                          |       |
|                                 |                                     | No matches found   |                                   |                          |       |
|                                 |                                     |  |                                   |                          |       |
|                                 |                                     |  |                                   |                          |       |
|                                 |                                     |  |                                   |                          |       |
|                                 |                                     |  |                                   |                          |       |
|                                 |                                     | Add Column     Copy  |                                   |                          |       |
| Selected Columns                | )                                   | + Add Column Cgpy  |                                   |                          |       |
| Selected Columns<br>Caption     |                                     | + Add Column Capy Description  |                                   |                          |       |
|                                 | er Status                           |  | g the status of the follow-up do  | cumentation for the pati | ient. |
| Caption                         | er Status                           | Description  | g the status of the follow-up doe |                          |       |
| Caption<br>Follow-up Provide    |                                     | Description<br>The column displays an icon indicatin                                       | g the status of the follow-up doe |                          |       |
| Follow-up Provide<br>DVT Orders | Risk                                | Description<br>The column displays an icon indicatin<br>Green - Pharm and Mech Orders Blue | g the status of the follow-up doe | n Orders Red - No Orde   | Hrs   |

#### Create a new My List

- 1. Click on the **Feature** 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
- Highlight a type of column, and click
   Add Column
- The newly added column names will display in the Selected Columns section in bottom half of the window
- 8. Use the Remove A V buttons to rearrange your columns in the order you would like to see them
- 9. Click Accept when you are done

|                          |                       | [112561]  |    |
|--------------------------|-----------------------|---|----|
| General Advanced         | Epic Monitor          |   |    |
| Name:                    |                       | 9   |    |
| Owner:                   | ABERTAM, SIDNEY-IPF   | RN 🔎  |    |
| Available Columns 18 n   | natches for 'patient' | Search: patient   | >  |
| Caption                  |                       | Description   |    |
| Patient Class            |                       | This column displays the patient's patient class. This information appears as it was entered.   | ,  |
| Patient Location         |                       | This column displays the patient's current location.  |    |
| Patient Name             |                       |   |    |
| Patient Name             |                       |   |    |
| Patient Name / Age       | / Sex or Bed Status   | This column displays the patient's name, age, and sex if the bed is occupied or the bed status if it<br>is not occupied.  | ,  |
| Patient Name/Ace/S       |                       | This column displays patient name, age, and sex. The information displays in Lastname   |    |
| Still Looking? Show mate | hes in descriptions   | 6 + Add Column Copy   |    |
| Selected Columns         |                       |   |    |
| Caption                  |                       | Description   |    |
| Patient Name             |                       | This column shows the patient's name. The information displays in Last Name, First Name form ···  |    |
| Last Admission Date      | 9                     | This column displays the patient's most recent inpatient admission. If the patient is currently ad $\!$ |    |
|                          |                       |   |    |
|                          |                       |   |    |
|                          |                       |   |    |
|                          |                       | 9 Accept <u>C</u> ance  | el |

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

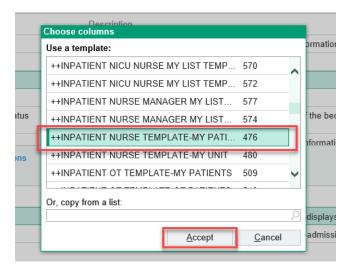
#### Copy an Existing User Template to Quickly Add Columns to your My List

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

| Owner: ABERTAM, SIDNEY-IPRN                                     |  |
|---|--|
| vailable Columns 18 matches for 'patient'                       | Search: patient  |
| Caption   | Description  |
| Patient Class   | This column displays the patient's patient class. This information appears as it was entered.                            |
| Patient Location  | This column displays the patient's current location.   |
| Patient Name  |  |
| Patient Name  |  |
| Patient Name / Age / Sex or Bed Status                          | This column displays the patient's name, age, and sex if the bed is occupied or the bed status if it<br>is not occupied. |
| Patient Name/Age/Sex  | This column displays patient name age and sex. The information displays in Lastname                                      |
| still Looking? Show matches in descriptions<br>ielected Columns | Add Column  Cgpy   |
| Caption   | Description  |
| Patient Name  | This column shows the patient's name. The information displays in Last Name, First Name form $\cdots$                    |
| i auoni ivanio  | This column displays the patient's most recent inpatient admission. If the patient is currently ad $\cdots$              |
| Last Admission Date   |  |
|   |  |

- 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 buttons to rearrange your columns in the order you would like to see them
- 7. 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



#### 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

|                                       | Jasmin's list [112561] |                      | x              | -                                    | and the second |
|---------------------------------------|------------------------|----------------------|----------------|--------------------------------------|--|
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| Default Report:                       |                        |                      |                |                                      |  |
| Refresh Interval (in minutes):        |                        |                      |                | Patient Lists                        |  |
| Show number of patients in the list   |                        |                      |                | 💀 Egit List 🗸 🎐 Sign In 🔏 Sign Out 🔅 | Pre-assign Pt Local  |
| Allow access to any of the following: |                        |                      |                | My Lists                             | My Patients O Patient  |
| User                                  | Access Level           |                      |                |                                      |  |
| ALEXANDER, JAMIE                      |                        | θ                    | Q              | The Patients                         | Detion   |
|                                       | ۹.                     | Title                | Number         | 5 My Unit                            | Patient Age/Sr Bed/L   |
|                                       |                        | Add/Remove Patients  | 3              | Shared Patient Lists                 |  |
|                                       |                        | Change Accessibility | 5              | JAS Shared List                      | 1  |
|                                       |                        | Delete Patient List  | 6              | O Pre login screen patient list      |  |
|                                       |                        | Modify Properties    | 4              |                                      |  |
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|                                       |                        | View Only            | 2              |                                      |  |
|                                       |                        |                      |                | Available Lists                      |  |
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|                                       |                        |                      |                | D HMH                                | 0  |
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|                                       |                        |                      |                |                                      |  |
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|                                       |                        | 4 Accept             | <u>C</u> ancel | harden and and and                   | a marking of   |