SKILL SHARPENER ACTIVITY
CST Enterprise Clinical Informatics

Patient Lists

Last Update: April 25, 2022

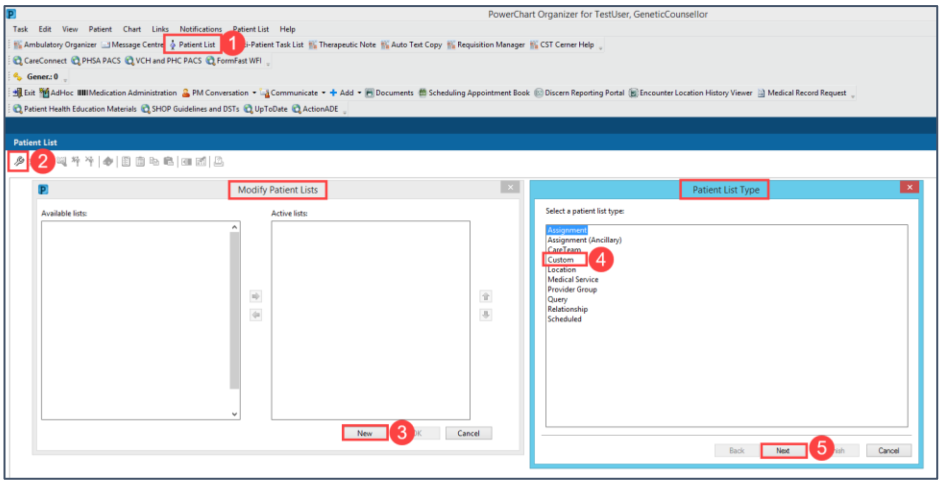
Learning Objectives
▪ To receive hands on experience with the **creating and maintaining patient lists** ▪ To understand why this workflow is potentially required to provide patient care

Scenario
By building a variety of lists, you can group patients by logical categories and locate a patient's chart easily, rather than relying on a single large list. Here, you will create a Custom Patient List

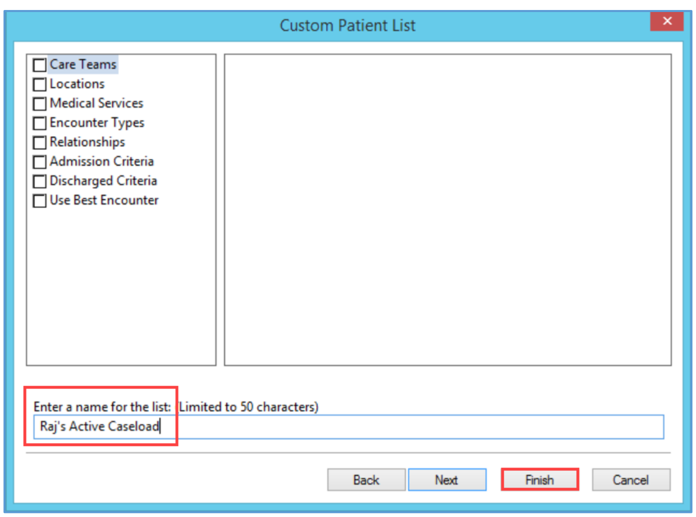
Complete Activity Setup	
▪ Domain	S0783
▪ Required Login(s) ▪ Required Password	Provided by Peer Mentor
▪ Patient ▪ Encounter Type ▪ Location	
▪ Provider Name Used	

Create a Custom Patient List

1. Select the **Patient List** tab in the toolbar.
2. Select the **Modify Patient Lists** window by clicking the wrench icon.
3. Click **New.**
4. In the **Patient List Type** window, click **Custom.**
5. Click **Next.** The **Custom Patient List** window opens.



6. Type a name for your **Custom List** into the box.
7. Click **Finish.**



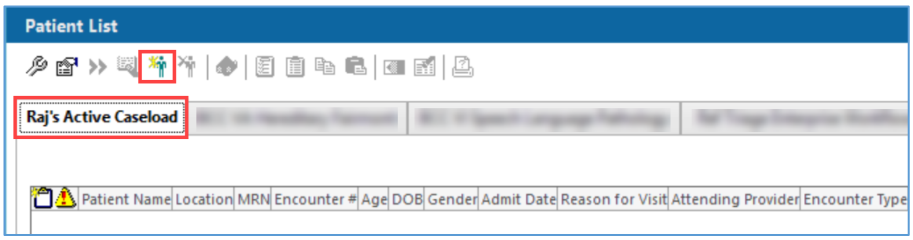
8. In the **Modify Patient Lists** window, select your newly created **Custom List.**

9. Click the blue arrow icon  to move your **Custom List** to the right, under **Active Lists**.

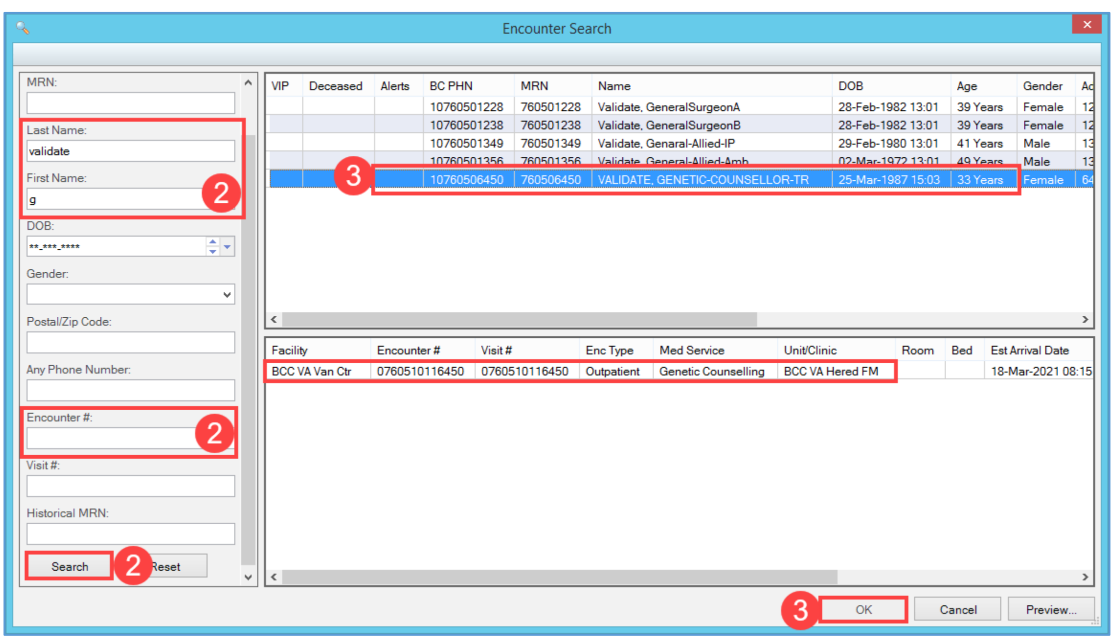
1. Click **OK** to return to **Patient Lists.** Your Custom List now appears.

Adding and Removing a Patients from your Custom List

1. To add patients to your list, click on Patient Lists in the toolbar, select your **Custom List** by clicking on the corresponding tab, and then selecting the **Add Patient icon.**



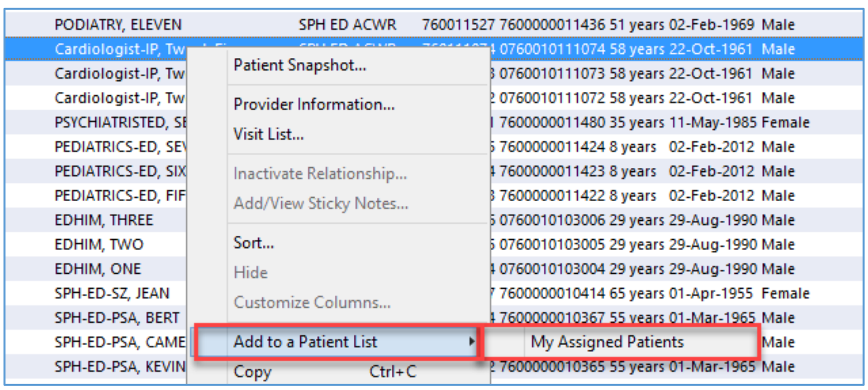
2. In the **Patient Search** window, search for the patient by their **first and last name, MRN,** or encounter number. **MRN** is the preferred search criteria, as the patient's name may not be unique.
3. After confirming the demographic information, select the most appropriate **medical genetics encounter**. Click **OK**.
   - If there are multiple encounters available for a patient, it is crucial that the proper encounter is selected by examining the encounter type, location and registration/discharge dates. This step will ensure that opening the patient chart from the patient list opens the correct encounter.



4. Your patient should now be present on your **Custom List**. You may need to click **Refresh**  to see your updated patient list.

Other ways to add a patient to your list

5. You can also add patients to your custom list by right clicking on a patient's name on another patient list, selecting **Add to a Patient List,** and then selecting your custom list.



6. You can also add patients to your custom list from within the patients chart, by clicking **Patient List** in the toolbar, and adding them to the appropriate list, similar to step 5.

To manually remove the patient from the Custom Patient List

1. Select the patient's name and click the **Remove Patient** icon to delete the selected patient from the patient list. You can also right click the patient and select Remove Patient from List.

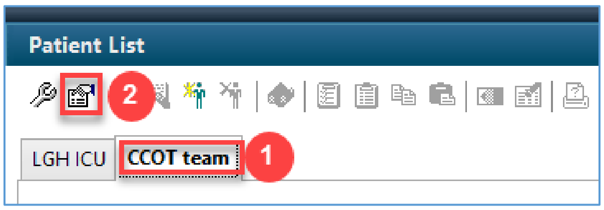
NOTES

- Once the **Patient Lists** are set up, they stay in your CST Cerner account until you manually delete the list.
- You can have an unlimited number of custom lists but you can only view 9 "active" lists at a time

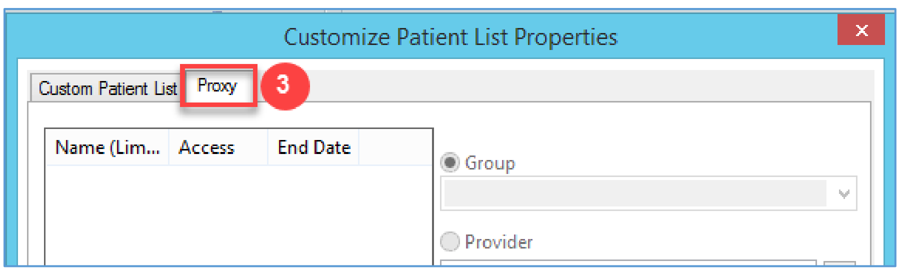
Proxy Custom Lists

1. While on **Patient List** page, select a patient list tab that you have created and want to share with another end user.

2. Click the **Properties** icon on the toolbar.

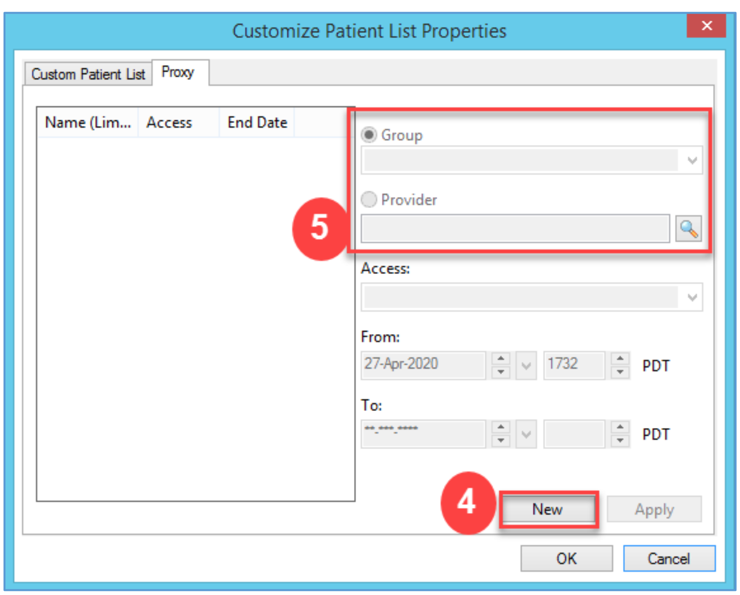


3. In the **Customize Patient List Properties** window, click on the **Proxy** tab

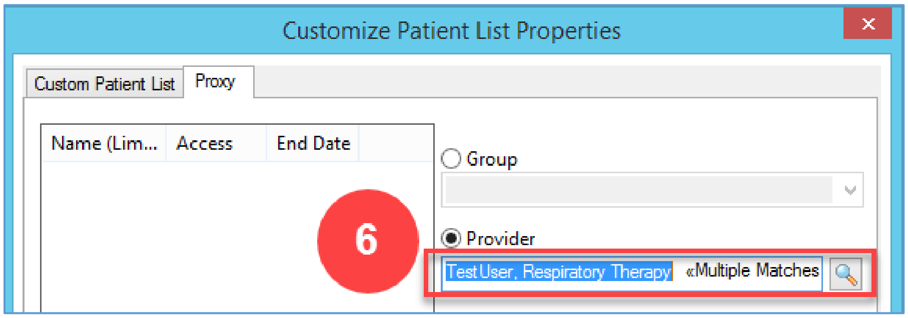


4. Click **New** to add a new proxy

5. Select **Provider** or **Group**

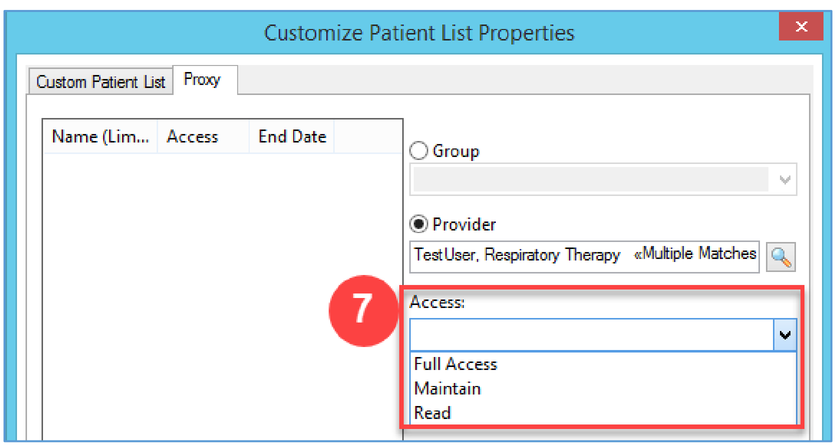


6. If **Provider** is selected, type the keyword of the recipient's name in the search box and click the **Search** icon to find the recipient's name.



7. Select the Access level as appropriate. Three levels of Access are available (Full, Maintain, and Read Only)

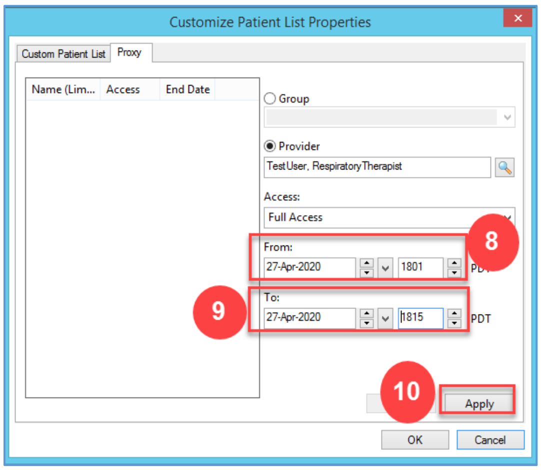
   - **Full Access** – the recipient has ability to view, modify, and delete the proxied patient list.
   - **Maintain** – the recipient has ability to add and remove patients from the proxied list but cannot delete this list.
   - **Read** – Read only access



8. In the **From** section, enter the proxy start date and time.

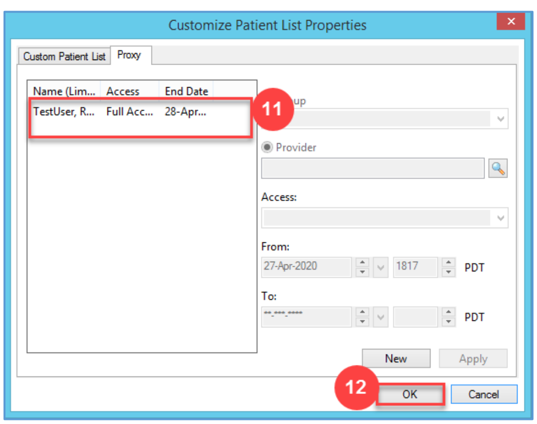
9. In the **To** section, enter the proxy end date and time as appropriate.

10. Click **Apply.**



11. The recipient's name is now displayed on the name list at the right side of the **Customize Patient List Properties** window.

12. Click **Ok.**



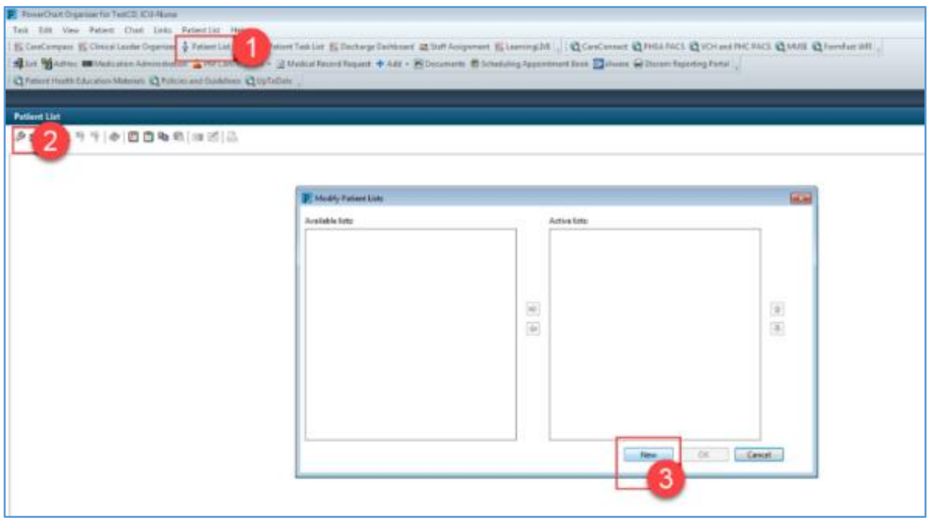
NOTES

- Entering an end date and time in **To:** section will terminate proxy access and the recipient will be removed from the proxy list.
- If the recipient is going to share the same patient list for a long term, change the year to 2099 for the end date of the proxy **OR** remove the hh:mm in the **From:** time box, and leave the **To:** section blank.

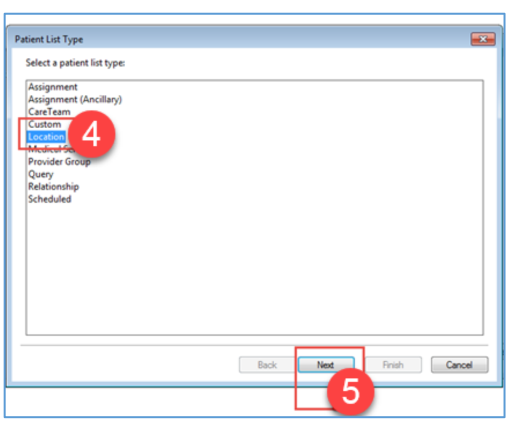
Create a Location List

A **Location list** is a list of patients associated to a particular location or list of locations. The list of patients is not modifiable in the application as it is based on patient census.

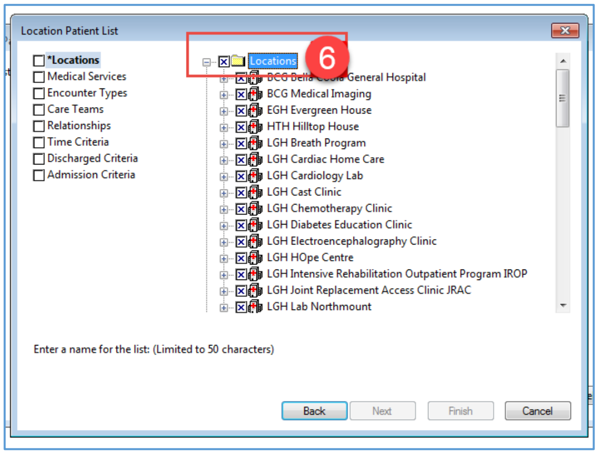
1. Select the **Patient List** Patient List from the **Toolbar** at the top of the screen.
2. Click the **List Maintenance** icon .
3. Select **New** in the bottom right corner within the **Modify Patient Lists** window.



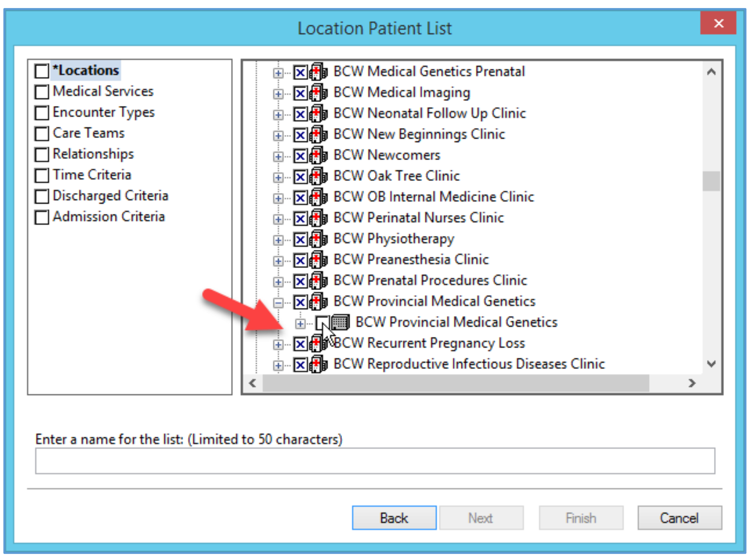
4. Select **Location** in the **Patient List Type** window.
5. Click **Next**.



6. Click the **plus sign** icon next to **Locations** to expand the list of locations.



7. Scroll down to the **location** assigned to you. (You may need to further expand a facility to select your specific unit). Check the **box** next to the unit name.



8. Location lists are automatically named for the location you select.

9. Click **Finish**.