Some patient lists are maintained by the system and automatically add new admissions and remove transfers or discharges. However, you can also build custom patient lists that might be more relevant to your workflow or role.

**BUILD CUSTOM LISTS**

Custom list patient entries are not generated automatically. You may need to manually add or remove patients from a custom list.

**Build a Relationship List**

You can build a patient list based on your established relationship to the patient. For example, if you are identified as the admitting physician, the patient’s name is automatically displayed when you build the relationship list.

1. From the **Patient List** toolbar, click the **List Maintenance** icon.

2. The **Modify Patient Lists** dialog box opens.

3. It displays **Available lists**: on the left an **Active lists**: on the right.

4. To create a new list, click **New**.
5. The **Patient List Type** dialog box opens.

![Patient List Type dialog box](image1)

6. Double-click **Relationship**.

7. The **Relationship Patient List** dialog box opens.

8. Click the **plus sign (+)** in front of **Visit Relationships** to expand this list and select your relationship.

![Relationship Patient List dialog box](image2)
9. From the Visit Relationships list, click in the checkbox to choose your relationship, e.g., Admitting Physician or Attending Physician.

10. Click Finish.

11. The Modify Patient Lists dialog box displays.

12. Click to highlight the new list name in the Available lists: pane and then click the blue arrow to move the name to the Active lists: pane.

13. Click OK to return to the Organizer screen.

*You can modify the order of the lists using the up and down arrows.*
14. The new list now appears as its own tab.

15. Click the tab to see the filtered list, e.g., Attending Physician.

Build a Personal / Custom List

A Personal/Custom list might be helpful to follow up on patients. It is also useful for inpatient nurses so they only display their patient assignments on the Patient Access List (PAL).

1. From the **Patient List** toolbar, click the **List Maintenance** icon.

2. The **Modify Patient Lists** dialog box opens.
3. It displays **Available lists**: on the left an **Active lists**: on the right.

4. To create a new list, click **New**.

5. The **Patient List Type** dialog box opens.

6. Double-click **Personal/Custom**.

7. The **Custom Patient List** dialog box opens.
8. Type a name for the list and specify a filter type (if applicable), e.g. My Follow-up List, My PAL.

9. Click Finish.

10. The Modify Patient Lists dialog box displays.

11. Click to highlight the new list name in the Available lists: pane and then click the blue arrow to move the name to the Active lists: pane.

12. Click OK to return to the Organizer screen.

You can modify the order of the lists using the up and down arrows.
13. The new list now appears as its own tab but no patient names are generated. You need to add the patients to a custom list.

Add a Patient to a Custom List

You cannot add or remove patients to Location, Provider Group or Medical Service list types.

Method 1 – Patient Search

1. Make sure you have clicked your custom patient list tab.
2. From the Patient List toolbar, click the Add Patient icon.
3. The Patient Search window opens.
4. Enter the appropriate search criteria and click Search to retrieve matching entries.
5. Select the correct patient and encounter and then click OK.
6. If prompted, assign a relationship and click **OK**.

7. The patient is added to your custom list.

8. Repeat the steps to add additional patients.

**Method 2 – When a Patient Chart is Open**

When a patient chart is open, click **Patient** on the menu bar and select **Add Patient to a Patient List** and then click the desired custom list.

**Method 3 – Add From Another Patient List**

Right-click on a patient on another list and choose **Add to a Patient List** and click the desired custom list. (If you have more than one list.)
Remove a Patient from a Custom List

*You cannot add or remove patients to Location, Provider Group or Medical Service list types.*

1. Open the patient list.
2. Select the patient’s name to be removed from the list.
3. From the Patient List toolbar, click the Remove Patient icon.
4. The patient’s name is no longer displayed on the patient list.

**BUILD SYSTEMS-GENERATED LISTS**

Build a Location List

A Location List is a designated location, such as a nursing unit, where all patients currently located in that unit are listed. The patient names are displayed automatically and patient entries cannot be added or removed from the list.

1. From the Patient List toolbar, click the List Maintenance icon.
2. The Modify Patient Lists dialog box opens.
3. It displays Available lists: on the left an Active lists: on the right.
4. To create a new list, click New.
5. The Patient List Type dialog box opens. Double-click Location.
6. The **Location Patient List** dialog box opens.

7. Click the **plus sign (+)** in front of **Locations**.

![Location Patient List dialog box](image1)

*Please note that you can also choose Locations Groups to generate a list of patients admitted to a specific location within a predefined location, e.g., J Colp Clinic. We won’t be doing that in our example.*

8. Click the **plus sign (+)** in front of the appropriate site location, e.g., LHSC-UC.

![Location Patient List dialog box](image2)
9. Click the **plus sign (+)** in front of the appropriate building location, e.g., UH Main.

10. Click checkbox for desired nursing unit location (or ambulatory location).

11. Click **Finish**.

12. The **Modify Patient** Lists dialog box displays.
13. Click to highlight the new list name in the **Available lists**: pane and then click the **blue arrow** to move the name to the **Active lists**: pane.

14. Click **OK** to return to the Organizer screen.

   *You can modify the order of the lists using the up and down arrows.*

15. The new list now appears as its own tab with all patient names automatically generated for that location.
Build a Medical Service List

Build a Medical Service list to show all patients admitted to a medical service. The names are displayed automatically. Patient entries cannot be added or removed from the list.

1. From the Patient List toolbar, click the List Maintenance icon.

2. The Modify Patient Lists dialog box opens.

3. It displays Available lists: on the left an Active lists: on the right.

4. To create a new list, click New.

5. The Patient List Type dialog box opens.

6. Double-click Medical Service.
7. Click in the appropriate checkbox for the medical service you require.

![Image of a list with checkboxes]

8. Click Finish.

9. The **Modify Patient** Lists dialog box displays.

10. Click to highlight the new list name in the **Available lists**: pane and then click the **blue arrow** to move the name to the **Active lists**: pane.

![Image of a modified list]

11. Click **OK** to return to the Organizer screen.
16. The new list now appears as its own tab with all patient names automatically generated for that medical service.

REMOVE A PATIENT LIST FROM THE PATIENT LIST VIEW

1. From the Patient List toolbar, click the List Maintenance icon.

2. The Modify Patient Lists dialog box opens.

3. Select the list from the Active lists pane that you no longer wish to display in the Patient List view.

4. Move the selected list to the Available lists: pane by clicking the left blue arrow.

5. Click OK to return to the Patient List view.

6. The patient list no longer displays (but it is not deleted, just not active.)

DELETE A PERSONAL PATIENT LIST

You can delete patient lists that you no longer use. A deleted patient list is destroyed and must be reinstated to be used again. An active list cannot be deleted and must first be moved to an available list (see above).

1. From the Patient List toolbar, click the List Maintenance icon.
2. The **Modify Patient Lists** dialog box opens.

3. It displays **Available lists**: on the left an **Active lists**: on the right.

4. Select the list from the **Available lists** pane that you wish to delete.

5. Right-click the list and click **Delete Patient List**.

6. The **Delete Patient List** dialog box opens.

7. Click **Yes** to the message.

8. Click **OK** at the **Modify Patient Lists** dialog box to save changes and return to the Patient List view.
PRINT A CUSTOM LIST

1. From your custom list, click the Task menu on the menu bar.
2. Click Print and then click Print Screen.
3. Make sure the correct printer is selected and then click OK.
### APPENDIX A

**Patient List Toolbar**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action Description</th>
</tr>
</thead>
</table>
| 🔄 | **List Maintenance**  
Opens the Modify Patient Lists dialog box to allow you to add new lists or modify existing lists. |
| 🖼️ | **Properties**  
Opens the Customize Patient List Properties dialog box so that you can apply filters to and set proxies for patient lists. |
| 👤 | **Add Patient**  
Opens the Patient Search dialog box to allow you to identify the patient to add to a list. |
| 🔴 | **Remove Patient**  
Removes the selected patient from a custom patient list. |
| 👤 | **Select All Patients**  
Selects all patients on the displayed patient list. |
| 🔴 | **Clear All Selections**  
Deselects all patients on the displayed patient list. |
| ☁️ | **Copy**  
Copies the selected names to the clipboard so that you can paste them into a different list or report. |
| 🔴 | **Hide Selected Rows**  
Hides rows on a patient list during the current session. |
| 📊 | **Customize Columns**  
Opens the Customized Columns Tool so you can change column sequence and inclusion on patient lists. |