



Personal (“MyList”) Patient Lists

Purpose

The **Patient Lists** workspace, available to all prescribers, allows groups of patients to be defined, tracked and shared. The default “My Patients” list is immediately useful. But much more specific functionality becomes possible when new “My Lists” are created and shared. A good starting point is to copy My List templates (standardized and tested for AHS contexts); or to adopt lists developed by colleagues.

At some point, users will want to add, remove or configure the many elements that can appear in lists. This Crib-Sheet highlights the most useful columns and settings for building personalized patient lists.

Use Cases

Different lists serve different purposes. The following use cases illustrate this. Although the focus is on inpatient contexts, “reminder lists” can also be used in outpatient contexts.

Inpatient Ward Rounds

A list optimized for daily rounds emphasizes visual indicators (icons) reflecting information needed while going from room to room.

Inpatient Service Management

A list optimized for inpatient team management will emphasize things like notes needing review or co-sign, orders requiring attention, professional billing reminders and team tasks.

Inpatient Discharge Planning (Rapid Rounds)

Multidisciplinary teams can use patient lists during “Rapid” rounds for discharge planning. Supporting lists will emphasize things like length of stay, expected discharge date, and discharge readiness indicators.

Inpatient Consult Rounds (IP and ER)

Inpatient and ER consult teams need to track patients that may be spread across many wards, with emphasis on things like attending physician accountability, consultation notes and specialty comments.

Patient Reminders

Most AHS facilities participate in training future health care providers. It can be helpful to track learning opportunities or other reminders that arise care.

Patient Archive

A master list of all patients seen by a particular provider during a particular professional billing period can help address questions related to charge submissions.

Lists, Reminders and Handoff Reports

The list columns highlighted in the use cases are relevant to both personal and reminder patient lists. The latter differs in having a special column that supports generating and tracking tasks related to a patient. Handoff reports have three fields (Summary, To Do, To Do – On Call). Any of these can be incorporated into personal or reminder patient lists.

Resources

- [Manual: Patient Lists](#)
- [Tip: Managing Patient Lists](#)
- [Collection: Recommended Patient List Columns](#)



Personal My List Examples

Use Case #1: Inpatient Ward Rounds

Type: Personal My List

My List Template: “++AHS IP MD WARD ROUNDS TEMPLATE++” [ID 3040200006]

Settings:

- General tab:
 - Sort = Room/Bed
- Advanced tab:
 - Default Report = Vitals [20010001]
 - Refresh Interval = 5
 - Show patient numbers = ON
 - Suppress rich features = OFF

| Column [ID] | Description |
|--|---|
| <i>Patient [Block 3043400205]</i> | [AHS] Display = patient's photo, name, age, and gender. Hover = additional identifier (including ULI, MRN) details. Double-click = open chart. |
| <i>Admission Info [Block 3043400201]</i> | [AHS] Display = patient's room, bed, location and primary hospital problem. Hover (problem) = hospital problems, priority sorted. Double-click (problem) = open chart to problem list. |
| <i>GCD [304345001]</i> | [AHS] Display = goals of care designation. Hover = same. Double-click = open chart. |
| <i>Length of Stay (Days) [304234721]</i> | [AHS] Display = IP length of stay (days). Hover = inpatient encounter details. Double-click = Rapid Rounds report. |
| <i>Exp Disch Date [103]</i> | Expected discharge date (set in discharge navigator). |
| <i>Level of Care [30410801]</i> | [AHS] Display = level of care designation. Hover = same. Double-click = Popup with additional details about ALC status changes. |
| <i>MEWS [100803]</i> | [AHS] Display = Modified Early Warning System (MEWS) score. Hover = MEWs derivation. Double-click = open chart to warning system tab in inpatient summary activity. |
| <i>Readiness [106185]</i> | [AHS] Display = overall discharge readiness. Hover = multidisciplinary readiness summary. Double-click = multidisciplinary readiness buttons. |
| <i>IP Notifications [Block 3043401601]</i> | [AHS] Display = icons for new results, new notes, cosign notes, and cosign orders. Hover = list of relevant results, cosign notes, new notes or cosign orders. Double-click = open chart to orders or notes activity. |
| <i>Expiring Orders [304445101]</i> | [AHS] Display = icon when active order(s) expiring. Hover = list of expiring orders. Double-click = open chart to orders activity. |

Use:

- The list is sorted by the patients' ward and bed location, so the list can be worked with while doing rounds.
- The “Write Handoff” button should be selected in the Patient Lists button bar (top of activity) so that selecting a patient causes editable handoff fields (summary, to do, to do on call) to appear in a panel to the right.
- Selecting a patient causes the inpatient vitals report to appear in a panel at the bottom of the lists screen, prominently displaying the “Sticky Note to MRHP” and “Care Team Sticky Note” which function like “Doc Board” reminders for most teams.
- Swap PEWS column (100786) for MEWS if on a pediatric inpatient service.



Use Case #2: Inpatient Service Management

Type: Personal My List

My List Template: “++AHS IP MD PATIENT MANAGEMENT TEMPLATE++” [ID 3040200007]

Settings:

- General tab:
 - Sort = Room/Bed
- Advanced tab:
 - Default Report = Physician Checklist [48211]
 - Refresh Interval = 5
 - Show patient numbers = ON
 - Suppress rich features = OFF

| Column [ID] | Description |
|--|---|
| <i>Patient [Block 3043401702]</i> | [AHS] Display = patient's (pref) name, age, and SOGI gender. Hover = additional identifiers (including ULI, MRN) details. Double-click = open chart. |
| <i>Pt Identifiers [Block 3043400204]</i> | [AHS] Display = patient date of birth, UL, MRN. Hover = same. Double-click = open chart. |
| <i>Level of Care [30410801]</i> | [AHS] Display = level of care for the current encounter. |
| <i>GCD [304345001]</i> | [AHS] Display = goals of care designation. Hover = same. Double-click = open chart. |
| <i>IP Notifications [Block 3043401601]</i> | [AHS] Display = icons for new results, new notes, cosign notes, and cosign orders. Hover = list of relevant results, cosign notes, new notes or cosign orders. Double-click = open chart to orders or notes activity. |
| <i>S/H Orders (>8h) [304363251]</i> | [AHS] Display = icon if a patient has signed and held orders older than 8 hours. Hover = list of recent SH orders. Double-click = open chart to orders activity. |
| <i>H&P Note [304345571]</i> | [AHS] Display = icon indicating a new H&P note (since time mark). Hover = list of recent H&P notes with click to view. Double-click = open notes activity at H&P tab. |
| <i>DC Summary [304345591]</i> | [AHS] Display = icon indicating a new Discharge Summary exists (since last time mark). Hover = list of recent DC notes with links to view. Double-click = open chart to notes activity at DC Summary tab. |
| <i>Prof Billing [304346792]</i> | [AHS] Display = icon signaling whether current user has daily billing(s). Hover = view all current charges. Double-click = popup editor to add or edit charges. |
| <i>My Sticky Note [17779]</i> | Displays icon for contents of personal note about patient (displays only for author; not shared). Double-click to edit. |
| <i>Provider Info [Block 3043400202]</i> | [AHS] Display = attending, referring, primary care providers. Hover = detailed treatment team info. Double-click = open editing tools to change provider(s). |
| <i>IP Team Info [3043400203]</i> | [AHS] Display = primary inpatient provider team, specialty service. Hover = detailed treatment team info. Double-click = open editing tools to change primary provider team. |

Use:

- The list emphasizes things an attending physician needs to take care of pre- or post-rounds, including co-signs, documentation review and professional billing. When a patient is selected, the bottom screen panel reveals admission, daily and discharge checklists.
- Intended for personal use (not sharing).



Use Case #3: Inpatient Discharge Planning Rounds (Rapid Rounds)

Type: Personal My List

My List Template: “++AHS IP RAPID ROUNDS CORE TEMPLATE++” (ID 304020001) or ++AHS IP RAPID ROUNDS VIRTUAL TEMPLATE++ (ID 304020002, if okay to reveal pt identity)

Settings:

- General tab:
 - Sort = Room/Bed
- Advanced tab:
 - Default Report = Rapid Rounds [3044560227]
 - Refresh Interval = 1
 - Show patient numbers = ON
 - Suppress rich features = OFF

| Column [ID] | Description |
|---|---|
| <i>Room/Bed</i> [30434202] | [AHS] Display = inpatient Room/Bed. Hover = patient & care team info. Double-click = open Rapid Rounds report. |
| <i>Level of Care</i> [30410801] | [AHS] Display = level of care designation. Hover = same. Double-click = Popup with additional details about ALC status changes. |
| <i>GCD</i> [304345001] | [AHS] Display = goals of care designation. Hover = same. Double-click = open chart. |
| <i>Problem</i> [30446667] | [AHS] Display = principal hospital problem. Hover = full hospital problem list, Double-click = open problem list editor. |
| <i>Length of Stay (Days)</i> [304234721] | [AHS] Display = IP length of stay (days). Hover = inpatient encounter details. Double-click = Rapid Rounds report. |
| <i>Exp Disch Date</i> [103] | Expected discharge date (set in discharge navigator). |
| <i>Readiness</i> [106185] | [AHS] Display = overall discharge readiness. Hover = multidisciplinary readiness summary. Double-click = multidisciplinary readiness buttons. |
| <i>Milestones</i> [304272101] | [AHS] Display = # discharge milestones complete. Hover = list of milestones w status. Double-click = EDD, Milestones, Delays editor. |
| <i>OC Eligible</i> [304020002] | [AHS] Display = eligibility (Y/N) for an over-capacity space. Hover = same. Double-click = popup OC status editor. |
| <i>Infection/Isolation</i> [Block 3043400400] | [AHS] Display = infection, communicable disease, isolation status. Hover = details. Double-click = open chart. |
| <i>Care Paths</i> [304981002] | [AHS] Display = active Care Path(s). Hover = current care path step. Double-click = open popup with Care Path discharge planning details. |

Use:

- Sorted by the patients’ location, so the list can servie multidisciplinary rapid rounds (discharge planning).
- The “Write Handoff” button should be selected in the Patient Lists button bar (top of activity) so that selecting a patient causes editable handoff fields (summary, to do, to do on call) to appear in a panel to the right of the list.
- Selecting a patient opens a Rapid Rounds report at the bottom of the screen that provides interactive discharge planning information. Double-clicking Room/Bed opens the report in popup.
- **Tip: Rapid Rounds Patient List**
- **Tip: Rapid Rounds Report**



Use Case #4: Inpatient Consult Service Management

Type: Personal My List

My List Template: “++AHS IP MD WARD CONSULTS TEMPLATE++” [ID 3040200008]

Settings:

- General tab:
 - Sort = Room/Bed
- Advanced tab:
 - Default Report = Physician Consults [3041200028]
 - Refresh Interval = 5
 - Show patient numbers = ON
 - Suppress rich features = OFF

| Column [ID] | Description |
|--|---|
| <i>Patient [Block 3043400205]</i> | [AHS] Display = patient's photo, name, age, and gender. Hover = additional identifier (including ULI, MRN) details. Double-click = open chart. |
| <i>Admission Info [Block 3043400201]</i> | [AHS] Display = patient's room, bed, location and primary hospital problem. Hover (problem) = hospital problems, priority sorted. Double-click (problem) = open chart to problem list. |
| <i>GCD [304345001]</i> | [AHS] Display = goals of care designation. Hover = same. Double-click = open chart. |
| <i>Length of Stay (Days) [304234721]</i> | [AHS] Display = IP length of stay (days). Hover = inpatient encounter details. Double-click = Rapid Rounds report. |
| <i>IP Notifications [Block 3043401601]</i> | [AHS] Display = icons for new results, new notes, cosign notes, and cosign orders. Hover = list of relevant results, cosign notes, new notes or cosign orders. Double-click = open chart to orders or notes activity. |
| <i>Consult Note [304345591]</i> | [AHS] Display = icon indicating a new Discharge Summary exists (since last time mark). Hover = list of recent DC notes with links to view. Double-click = open chart to notes activity at DC Summary tab. |
| <i>Prof Billing [304346792]</i> | [AHS] Display = icon signaling whether current user has daily billing(s). Hover = view all current charges. Double-click = popup editor to add or edit charges. |
| <i>Specialty Comments [4289]</i> | Specialty-specific comments that can focus on consultation interests. |
| <i>Provider Info [Block 3043400202]</i> | [AHS] Display = attending, referring, primary care providers. Hover = detailed treatment team info. Double-click = open editing tools to change provider(s). |
| <i>IP Team Info [3043400203]</i> | [AHS] Display = primary inpatient provider team, specialty service. Hover = detailed treatment team info. Double-click = open editing tools to change primary provider team. |

Use:

- Sort by the patients' location, so the list can be worked through while doing consult rounds.
- Selecting a patient also causes the consulting physician overview to appear in a panel at the bottom of the screen, containing useful information and consult completion actions.



Use Case #5: Emergency Consult Service Management

Type: Personal My List

My List Template: “++AHS IP MD WARD CONSULTS TEMPLATE++” [ID 3040200008]

Settings:

- General tab:
 - Sort = Room/Bed
- Advanced tab:
 - Default Report = Physician Consults [3041200028]
 - Refresh Interval = 5
 - Show patient numbers = ON
 - Suppress rich features = OFF

| Column [ID] | Description |
|---|---|
| <i>Patient [Block 3043400205]</i> | [AHS] Display = patient's photo, name, age, and gender. Hover = additional identifier (including ULI, MRN) details. Double-click = open chart. |
| <i>Admission Info [Block 3043400201]</i> | [AHS] Display = patient's room, bed, location and primary hospital problem. Hover (problem) = hospital problems, priority sorted. Double-click (problem) = open chart to problem list. |
| <i>GCD [304345001]</i> | [AHS] Display = goals of care designation. Hover = same. Double-click = open chart. |
| <i>Length of Stay (Days, Hours) [304234722]</i> | [AHS] Display = IP length of stay (days, hours). Hover = inpatient encounter details. Double-click = Rapid Rounds report. |
| <i>Bed Request Status [49552]</i> | Displays the unit, room, bed destination, and bed status for a patient's pending bed request. |
| <i>IP Notifications [Block 3043401601]</i> | [AHS] Display = icons for new results, new notes, cosign notes, and cosign orders. Hover = list of relevant results, cosign notes, new notes or cosign orders. Double-click = open chart to orders or notes activity. |
| <i>Consult Note [304345511]</i> | [AHS] Display = icon indicating a new Discharge Summary exists (since last time mark). Hover = list of recent DC notes with links to view. Double-click = open chart to notes activity at DC Summary tab. |
| <i>H&P Note [304345571]</i> | [AHS] Display = icon indicating a new H&P note (since time mark). Hover = list of recent H&P notes with click to view. Double-click = open notes activity at H&P tab. |
| <i>Specialty Comments [4289]</i> | Specialty-specific comments that can focus on consultation interests. |
| <i>Provider Info [Block 3043400202]</i> | [AHS] Display = attending, referring, primary care providers. Hover = detailed treatment team info. Double-click = open editing tools to change provider(s). |
| <i>IP Team Info [3043400203]</i> | [AHS] Display = primary inpatient provider team, specialty service. Hover = detailed treatment team info. Double-click = open editing tools to change primary provider team. |

Use:

- Sort by the patients' location, so the list can be worked through while doing consult rounds.
- Selecting a patient also causes the consulting physician overview to appear in a panel at the bottom of the screen, containing useful information and consult completion actions.



Use Case #6: Teaching Reminders

Type: Personal Reminder List

Template: [none, build from specifications below]

Settings:

- General tab:
 - Sort = Patient Name
- Advanced tab:
 - Default Report = Patient Reminder Lists
 - Refresh Interval = 30
 - Show patient numbers = ON

| Column [ID] | Description |
|--|--|
| <i>Patient [Block 304340205]</i> | [AHS] Display = patient's photo, name, age, and gender. Hover = additional identifier (including ULI, MRN) details. Double-click = open chart. |
| <i>Problem List [30432101]</i> | [AHS] Display comma delimited hospital problems. Hover = full hospital problem list, Double-click = open chart at problem list. |
| <i>My Sticky Note Text [304177781]</i> | [AHS] Display = note text of My Sticky Note. Hover = same. Double-click = edit Sticky Note. |
| <i>Reminders [34391]</i> | (Mandatory element) displays all tasks/reminders and due dates added to each patient row. Double-clicked to edit tasks/reminders. |

Use:

- This simple list can be used to keep track of patients for whom “education prescriptions” or other follow-up reminders have been generated.



Use Case #7: Patient Archive

Type: Personal My List

Template: “++AHS IP MD PATIENT ARCHIVE++” [3040200009]

Settings:

- General tab:
 - Sort = Patient Name
- Advanced tab:
 - Default Report = Charge Review
 - Refresh Interval = 30
 - Show patient numbers = ON
 - Suppress rich features = OFF

Access: Possibly share with professional billing assistant.

High-value field elements (use one or more):

| Element | Description |
|--|---|
| <i>Patient [Block 3043400205]</i> | [AHS] Display = patient's photo, name, age, and gender. Hover = additional identifier (including ULI, MRN) details. Double-click = open chart. |
| <i>Pt Identifiers [Block 3043400204]</i> | [AHS] Display = patient date of birth, UL, MRN. Hover = same. Double-click = open chart. |
| <i>Problem List [30432101]</i> | [AHS] Display = comma delimited list of problems. Hover = full hospital problem list. Double-click = open problem list editor. |
| <i>Prof Billing [304346792]</i> | [AHS] Display = icon signaling whether current user has daily billing(s). Hover = view all current charges. Double-click = popup editor to add or edit charges. |
| <i>Provider Info [Block 3043400202]</i> | [AHS] Display = attending, referring, primary care providers. Hover = detailed treatment team info. Double-click = open editing tools to change provider(s). |
| <i>My Sticky Note Text [304177781]</i> | [AHS] Display = note text of My Sticky Note. Hover = same. Double-click = edit Sticky Note. |

Use: This list can be used to support questions that may arise during professional billing adjudication.