



Building a Custom Patient List: How to Add/Remove Patients

Building patient lists will help organize and access a large amount of patient data. You are allowed 10 different patient lists at one time in COMPASS. A patient list can be based on patient location, provider relationship, or customized criteria selected by the caregiver. Customizing your patient list may help you locate charts more quickly.

When you build a Custom List, patient entries are not generated automatically. You must manually add the patients you want on the list. You can add patients to - or remove patients from - your list. A patient's chart can be opened directly from a Patient List once a relationship has been established. A record of all patient/healthcare relationships created is maintained by the system for audit purposes and is recorded to protect patient privacy.

Admission/ Discharge Filters- You must enter units of time. Enter a number from 1-120 for days or 1- 24 for hours in the Time box and then select days or hours from the Units list.

Not Discharged- No requirement for a unit of time entry.

The following steps in this document are related to building a Custom Patient List in Compass Powerchart.

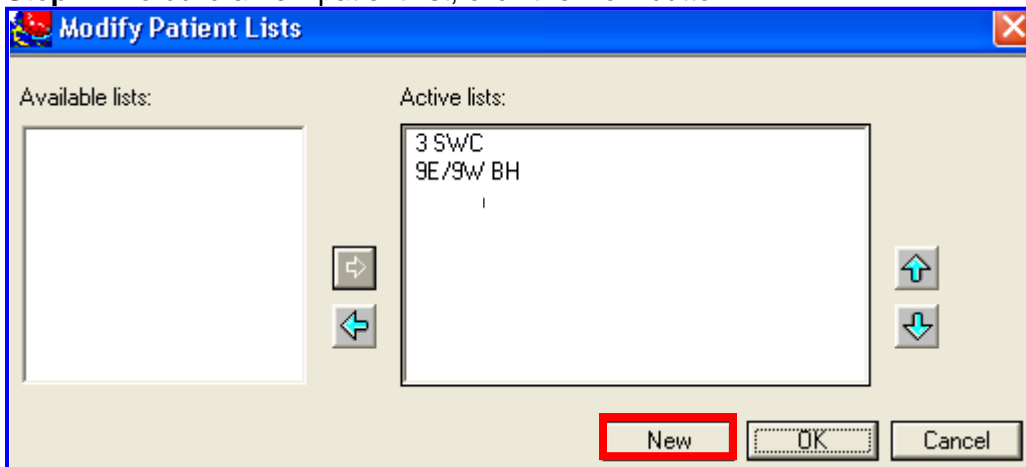
Step 1: In the example below, there are only 2 Location Lists available; 3SWC and 9E. BH, 9W BH. For all patient list maintenance activities:

Click the patient list maintenance tool - the *wrench icon*.

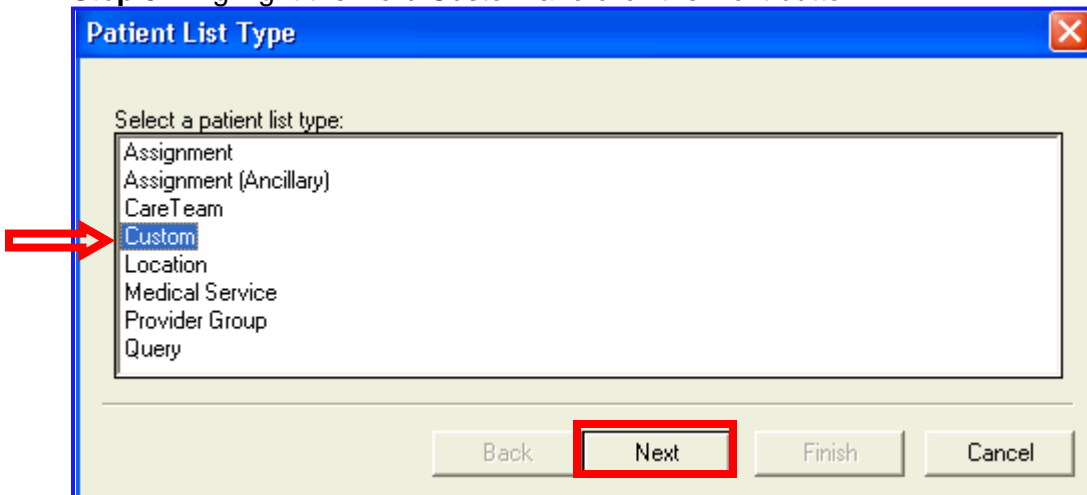
A screenshot of the COMPASS software interface. At the top, there is a navigation bar with icons for Patient List, Message Center, Scheduling, Reference Guide, and Up to Date. Below this is a header for "Patient List". A toolbar contains several icons, with a wrench icon highlighted by a red box. Below the toolbar, there are two tabs: "3 SWC" (selected) and "9E BH, 9W BH". Below the tabs, it says "All Patients - 3 SWC". At the bottom, there is a table with columns: Room, Bed, NFP, Name, MRN, Age, Sex, FIN, and Length of.

Room	Bed	NFP	Name	MRN	Age	Sex	FIN	Length of
------	-----	-----	------	-----	-----	-----	-----	-----------

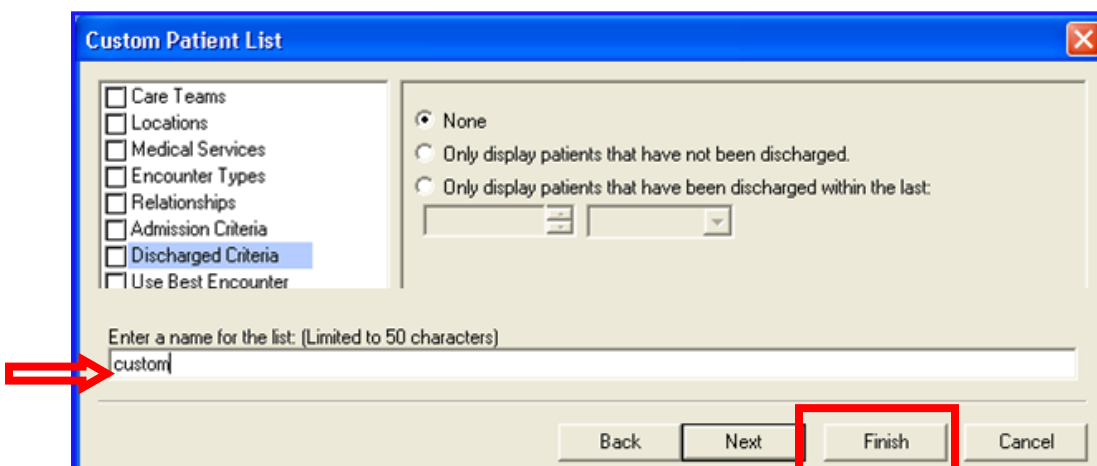
Step 2: To build a new patient list, click the *New* button.



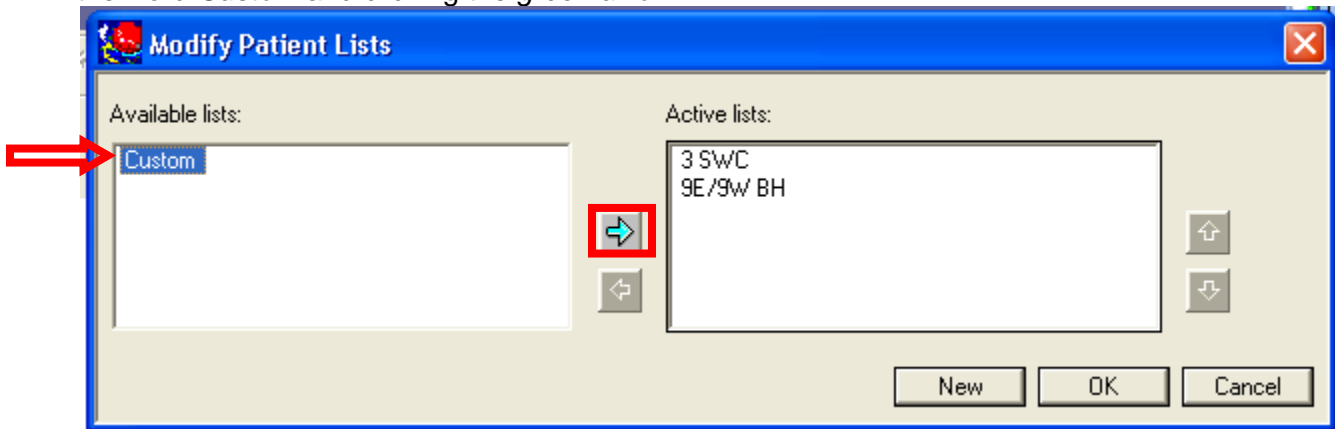
Step 3: Highlight the word *Custom* and click the *Next* button.



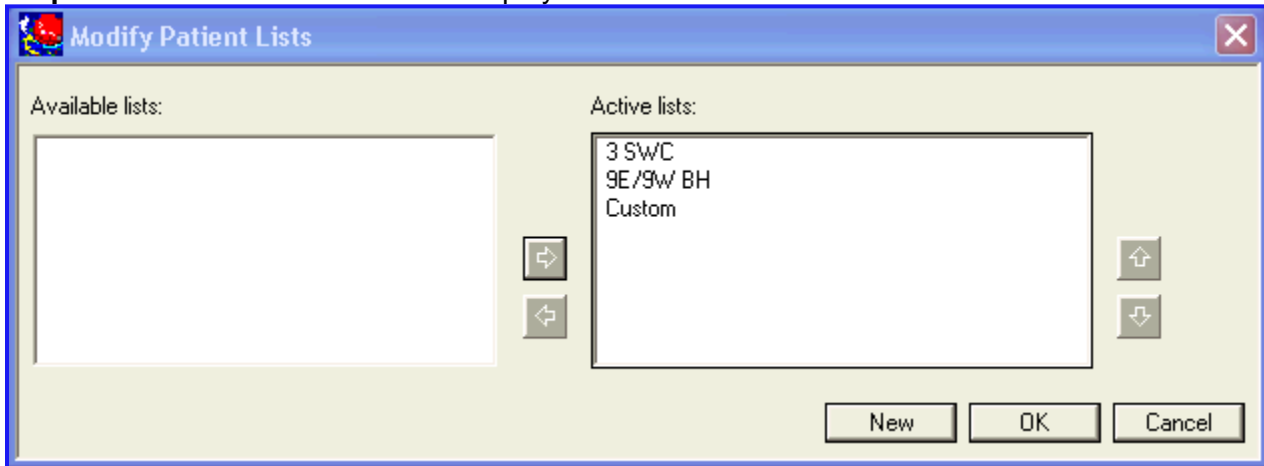
Step 4: Since the automated system updates for admission and discharge does not update a Custom Patient List, your filters for Admission and Discharge are not required. Enter a name for the list, for this example *Custom* is entered. Click the *Finish* button.



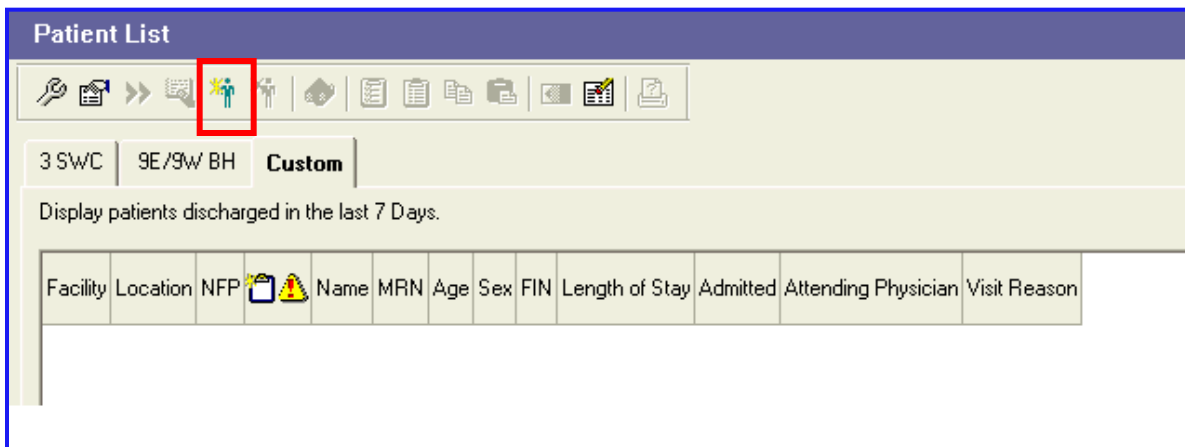
Step 5: Next, move the Custom List from the Available list to the Active list column by highlighting the word *Custom* and clicking the *green arrow*.



Step 6: The new Custom List now displays in the Active list window. Click *OK*.

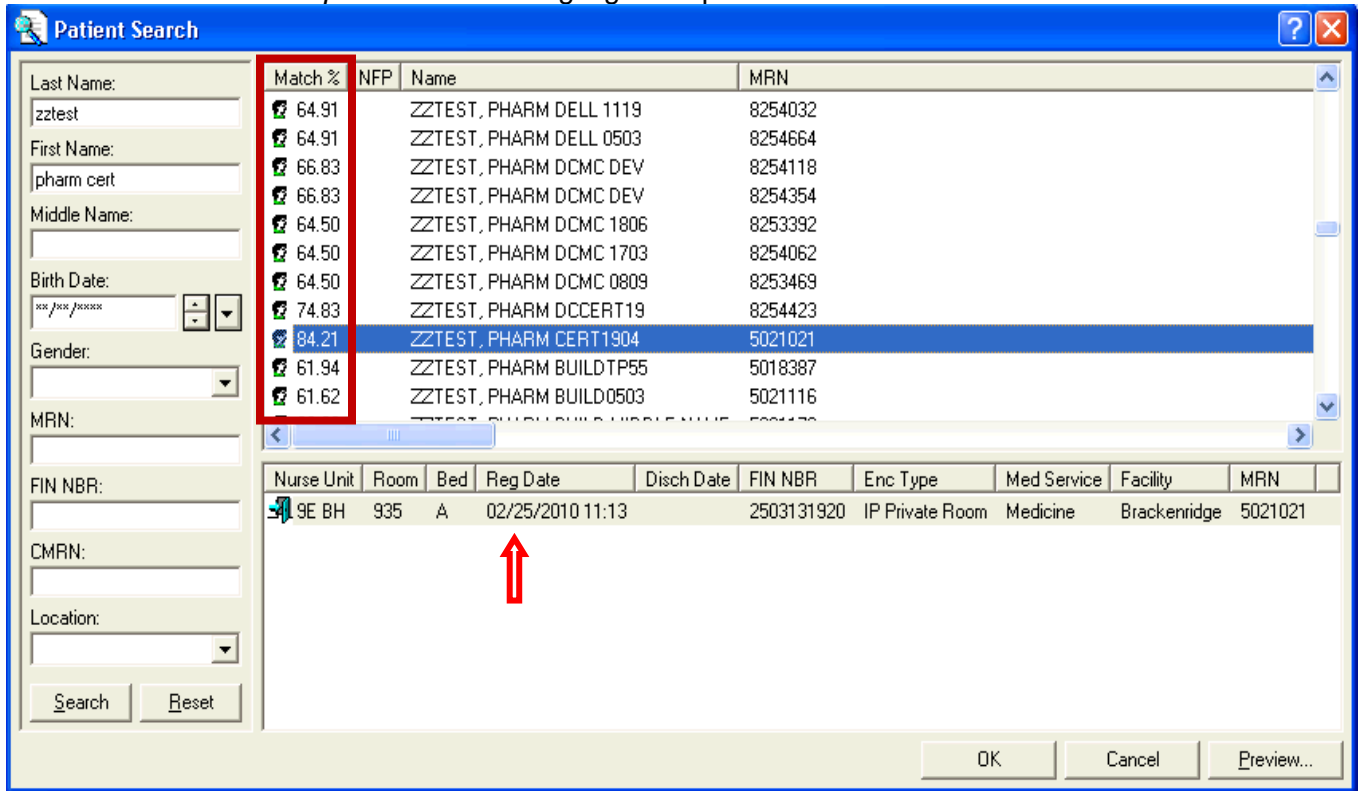


Step 7: The Custom List is now available to add a patient. There are two methods to add patients to your Custom list. One method is to add the patient by the patient search function. Click the *green figure with a yellow asterisk*.



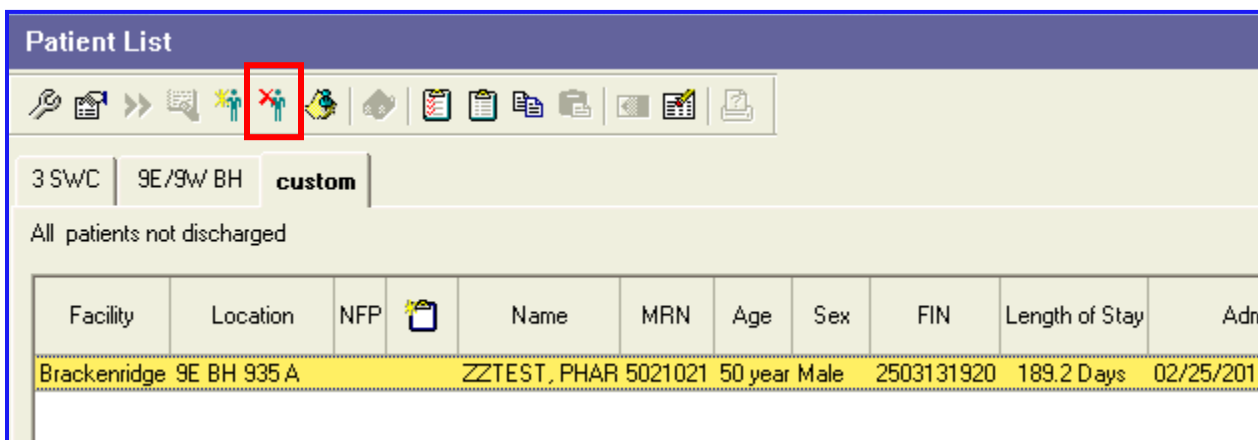
Step 8: The patient search window opens. Enter the patient information to conduct the search, example: the patient's last name and the first name. Notice the Match % in the left column in the upper box and the Nurse Unit, Room, Bed and Reg Date are located in the box below.

Double click the correct *patient name* or highlight the patient's name and click *OK*.



Step 9: If the patient name does not appear on the Custom Patient List, click refresh. You will be responsible for adding and removing patients from this list. Now, practice removing the patient you just added.

Highlight the patient's name to be removed from the patient list and click the *green figure with the red X*.



Step 10: Add a patient to the Custom List from a Location List:

- Find your patient from the Location List, highlight the patient name, and *right click*
- From the menu options, select *Add to a Patient List*
- Click *Custom*.

Patient List

3 SWC | 9E BH, 9W BH | Custom

All Patients - 9E BH, 9W BH

Room	Bed	NFP	Name	MRN	Age	Sex	FIN	Length of Stay	Admitted
933	A		ZZTEST, OLIVE	5022487	46 years	Female	2503134490	150.3 Days	05/20/2011 8:40
937	A		DILLION, UMCBINPATIENT	5022885	61 years	Male	2503135241	11.0 Days	10/06/2011 12:3
938	A		ZZTEST, PHARM QRT BUILD	5022790	4			Days	09/12/2011 8:13
904W	A		BHUAT, ACUTECARENINE	5022297	21			Days	04/07/2011 7:04
909W	A		ZZTEST, PALTEST	5022576	4			Days	07/27/2011 15:3

Context menu for patient DILLION, UMCBINPATIENT:

- Patient Snapshot...
- Provider Information...
- Visit List...
- Inactivate Relationship...
- Add/View Sticky Notes...
- Sort...
- Hide
- Customize Columns...
- Add to a Patient List**
 - Custom**
- Copy (Ctrl+C)
- Paste (Ctrl+V)
- Open Patient Chart

Step 13: The patient's name now displays on the Custom List.

Patient List

3 SWC | 9E BH, 9W BH | **Custom**

Facility	Location	NFP	Name	MRN	Age	Sex	FIN	Length of Stay
Brackenridge	9E BH 937 A		DILLION, UMCBINPATIENT	5022885	61 years	Male	2503135241	11.0 Days