# Patient Lists Pocket Guide

**For assistance, call the ServiceDesk at 4-1675 or (512) 324-1675**

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v1

## Types of Patient Lists Available

**Physicians may build numerous types of patients lists in COMPASS. The most common lists used by physicians are:**

- Custom List—Allows a physician to build and maintain patient census lists on their own. Patients are added and deleted from this list by the physician personally—and not by the facility's admission/registration system.
- Provider Group List—Displays all patients seen by any physician in your medical practice.
- Visit Relationship List— A helpful list for physicians in solo practice. Displays patients based on physician relationship (attending, consulting, etc.)

## Notes

## Creating Custom Patient Lists

1. From the Patient List (Organizer) tab, click the **List Maintenance** icon (wrench) on the horizontal toolbar at the top of your screen.
2. Click **New**.
3. The *Patient List Type* window will open. Click **Custom**.
4. Click **Next**.
5. Name your custom list.
6. Decide if you want to add a **proxy** to this list. If so:
   - Click **New** → Select the group or provider, appropriate access and duration→ Click **Apply**.
7. Click **Finish**. The *Patient List Type* window will close.
8. Select the list in the *Available Lists* window.
9. Click the **Add** arrow to move the list to the *Active List* window.
10. Click **OK**.

## Adding a Patient to a Custom List

1. Click on the custom list where you want to add the patient.
2. Click **OK**.
3. Click the **Add Patient** icon on the horizontal toolbar at the top of your screen.
4. The *Patient Search* window will open. Search for the patient by name, MRN or other criteria.
5. Click **Search** *or* press the enter key.
6. Click on the patient you wish to add to the custom list.
7. Click **OK**.

## Removing a Patient from a Custom List

1. Click on the custom list where you want to remove the patient.
2. Click **OK**.
3. Click once on the name of the patient to remove. *Tip: Do not double-click on the name, as this will open the chart.*
4. Click the **Remove Patient** icon on the horizontal toolbar at the top of your screen.
5. Patient will no longer appear on this custom list.

*Tip: Patients will remain on a custom list until you manually delete them.*

## Creating a Visit Relationship List

1. From the Patient List (Organizer) tab, click the **List Maintenance** icon (wrench) on the horizontal toolbar at the top of your screen.
2. Click **New**. The *Patient List Type* window will open.
3. Select **Visit Relationship**. Click **Next**. Name this list.
4. Select which relationships (attending, etc) you want to display on the list. Click **Next**.
5. Select the **Not Discharged** option from the Filter section.
6. If you wish to add a proxy, follow instructions on page 7.
7. Select all the facilities at which you are credentialed.
8. Click **Finish**.
9. Select the list in the *Available Lists* window.
10. Click the **Add** arrow to move the list to the *Active List* window.
11. Click **OK**.

## Creating a Provider Group List

1. From the Patient List (Organizer) tab, click the **List Maintenance** icon (wrench) on the horizontal toolbar at the top of your screen.
2. Click **New**. The *Patient List Type* window will open.
3. Select **Provider Group**. Click **Next**.
4. Select your provider group from the list. Click **Next**.
5. Select the **Not Discharged** option from the Filter section.
6. If you wish to add a proxy, follow instructions on page 7.
7. Select all the facilities at which you are credentialed.
8. Click **Finish**.
9. Select the list in the *Available Lists* window.
10. Click the **Add** arrow to move the list to the *Active List* window.
11. Click **OK**.

## Deleting a List

1. From the Patient List (Organizer) tab, click the **List Maintenance** icon (wrench) on the horizontal toolbar at the top of your screen.
2. In the *Active Lists* section (the right pane), **click** once on the list to delete.
3. Click the **left arrow**, moving the list from *Active Lists* to *Available Lists*. The list is now inactive.
4. To permanently delete the list, **right-click** on list name.
5. Select **Delete List**.

## Printing a Rounds Report

1. Click on the word **Task** on the toolbar at the very top of the screen.
2. Click **Reports**.
3. The *Reports* window will open. Place a checkmark in front of the report you wish to print. Choices are *24 Hour Physician Rounds Report* or *72 Hour Physician Rounds Report*.
4. Set your date range criteria in the lower portion of the *Reports* window.
5. Select a printer from the drop-down list.
6. Click **Print**.
7. The report will print immediately on the printer you selected.

## Notes