Royal United Hospital Bath NHS
NHS Trust

InPatients

Maintaining Patient Lists, Patient Access List and Favourite Folders

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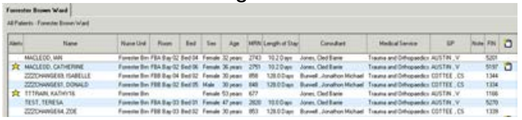
BT Bringing it all together

Date:13/09/2011 Version: 2.0

1 Guide to "Lists" within PowerChart

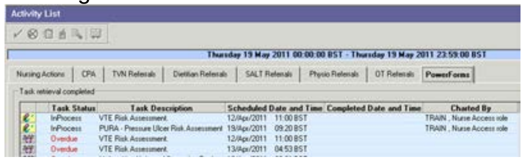
Note: There a number of "lists" used in PowerChart

1. **Patients List** Patient List is the "master list". Useful for Ward Managers as it show LOS



2. **Patient Access List (PAL)** Patient Access List. This is the main list to be used by the nurses to view bed board (and shows outstanding assessments see icon)

3. **Activity List** – within a patient record – the "nursing worklist"



2 Setting Up Patient List for a Ward

Step 1. Within Powerchart PowerChart select Patient list Patient List (in the top bar menu).

Step 2. Click on the List Maintenance tool (left hand side of the screen).

Step 3. Click New in the Modify Patient List

Step 4. Select **Location** from **Patient List Types.**

Step 5. **Click** Next **Expand** list of locations on right hand side of screen(use the icon to expand lists).

Step 6. Select required ward Charlotte Ward

Step 7. Select **Encounter Type** from the Patient List Types and check Inpatient and Day case as appropriate.

Step 8. Select **Discharge Criteria** from the Patient List

Types and check **Only display patients that have not been discharged.**

Step 9. click **Finish** Finish

Note: The name of the selected ward appear in the "Enter a name" box

The new list will appear in the Available List pane

Step 10. Select the newly created list from the Available Lists pane within Modify Patient list screen.

Step 11. Click the blue arrow to move it across to the Active Lists pane and Click OK to view the list

Result: The Patient List is now available (and can also be viewed via PAL and /or MPTL)

3 Setting Up Patient Access list for a Ward

Step 1. Within Powerchart PowerChart select Patient list Patient Access List (in the top bar menu).

Step 2. Right click on the light thin blue bar near the top of the screen. Select Change Patient List from the dialogue box

Step 3. Select the required ward from the list and click OK. If the ward required is not in the list go to section 2 to set up that ward.

If the user has just logged on and there are new patients on the ward or a new list has just been created, the **Established Relationship** dialog will be displayed. The purpose of the Establish Relationship dialogue is to record the role the user has in relation to the patient on the list.

Step 4. Select the appropriate relationship (e.g. **Nurse Access Role**) from the **Select an appropriate relationship)** drop down box.

Step 5. Click **OK**

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Maintaining Patient Lists

4 Changing the Time Frame on a Patient access List and Activity List

Note: Normally the PAL and Activity list are set to just show PowerForms and Nursing Tasks that are overdue or due today. If you wish to see future tasks (e.g. when the next PURA is required) you will need to change the **timeframe**

Step 1. Right Click on the light thin blue bar near the top of the screen.

Step 2. In PAL select Change Time Frame

Step 3. In Activity List select Change Time Frame Criteria

Step 4. Select Generic Time Frame and change the to and from date and time at the bottom of the screen. Select OK

Result: You can now view all **nursing tasks** and **PowerForm** due or over due by the chosen date

Step 5. To revert to today's view select Defined Time Frame and select 24 Hour Shift and select OK.

Setting Up Favourites

5 Setting Up Favourite Folders

Note: User Favourites and Trust Folders can be used - to quickly access Snomed coded problems, co-morbidities, alerts, allergies, reactions etc.

Folders Trust Folders are maintained centrally and cannot be altered by the user, and are available for
- Alerts (always use Trust Folder for Alerts)
- Co-morbidities
- Outpatient Procedures
- Theatre and non-theatre procedures
- Top 20 allergies
- To Take Away drugs (for pharmacist)

Favourites Favourite folders are maintained by the user

Favourites folders can only be maintained from within the patients record (i.e. as you add an alert/allergy etc.)

Step 1. To add an allergy to the Users Favourite Folder, within Powerchart PowerChart go to the patients record select allergies and within the Allergies Pane select Add icon

Step 2. Enter the allergy in the search field and use the binoculars. The Snomed screen will open

Step 3. Select the substance from the list that most precisely describes the allergy.

Step 4. Before adding the allergy click Add to Favourites

Step 5. To create a new folder click Create Folder in the dialog box. (If the folder already exist click on the required existing folder and go to step 7)

Step 6. Type in name of new folder and click somewhere in the dialogue box (the new folder is now created)

Step 7. Click on the new/required folder to select it. Click OK

Result: The allergies has now been added to the new folder

Step 8. Click OK again to select allergy and complete add allergy form.

Tracking Case Notes

6 Single Tracking

Step 1. In HIM tracking Open the patient record by scanning the barcode or by searching for the patient manually.

Step 2. Select the volume you wish to change the tracking location for

Step 3. Click the 'Update Location for Selected Records' icon

Step 4. Select the location you wish to track to

Step 5. Click OK

Step 6. The tracking location is updated

7 Batch Tracking

Step 1. In HIM tracking Click the Record Location Batch Update icon

Step 2. Select the facility

Step 3. Select tracking location

Step 4. Scan case note barcode

Note: *If case note has no barcode, see label printing*

Step 5. Repeat Step 4 for each case note you want to track to this location

Caution: Ensure you are tracking the correct notes. You cannot delete a tracking once saved. To remove a patient from the list, highlight it in the left-hand pane and click the Remove icon .

Step 6. Click the 'Save' icon to track the notes onto the specified location

Result: The tracking location of each case note is updated to the specified location