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Bringing it all togethe

Version: 2.0







Maintaining Patient Lists, Patient Access List and **Favourite Folders**

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Maintaining Patient Lists

Guide to "Lists" within PowerChart

There a number of "lists" used in PowerChart Note: 1. Patients List A Patient List is the "master list".

Useful for Ward Managers as it show LOS

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

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see #icon)

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

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	The	sday 19 May 2011 00:00:00 BST - Thursday	19 May 2011 23:59:00 851
Actions CPA	TVN Relevals Dietition Releva	s SALT Relenals Physic Relenals 01	Reletais PowerForms
trieval completed			
Task Status	Task Description	Scheduled Date and Time Completed Date	and Time Charted By
InProcess	VTE Risk Assessment.	12/Apr/2011 11:00 BST	TRAIN, Nurse Access role
InProcess	PURA - Pressure Ulcer Risk Assessmer	19/Apr/2011 09:20 BST	TRAIN, Nurse Access role
Overdue	VTE Risk Assessment	12/Apr/2011 11:00 BST	
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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 Expand list of locations on right hand side of screen(use the Ficon to expand lists).
- 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

Maintaining Patient Lists

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

Finish Step 9. click Finish

The name of the selected ward appear in the "Enter Note: 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 **1** 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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- 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 C Defined Time Frame and select 24 Hour Shift and select OK.

Setting Up Favourites

Setting Up Favourite Folders

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

Example 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 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 <u>Create Folder</u> 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 ^{III} 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 Sclick the Record Location Batch Update con
- 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 X icon .
- Step 6. Click the 'Save' kiew icon to track the notes onto the specified location
- **Result:** The tracking location of each case note is updated to the specified location