Patient Lists Setup and Support Guide

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Your Responsibilities for Safe Use

This documentation will help guide you through the available software configuration options so you can decide the right configuration for your organization. Of course, safe and compliant use of the software in any configuration requires you and your users to use good judgment and perform certain responsibilities, including each of the following: enter and read information accurately and completely; be responsible for configuration decisions; ensure compliance with laws and regulations relevant for your organization; confirm the accuracy of critically important medical information (e.g., allergies, medications, results), just as you would with paper records; actively report suspected errors in the software to both Epic and affected personnel; thoroughly test the software to ensure it's accurate before using it; and use the software only according to standards of good medical practice. You also are responsible for training your personnel and other users to perform these responsibilities. Not performing any of these responsibilities may compromise patient safety or your compliance with applicable requirements.

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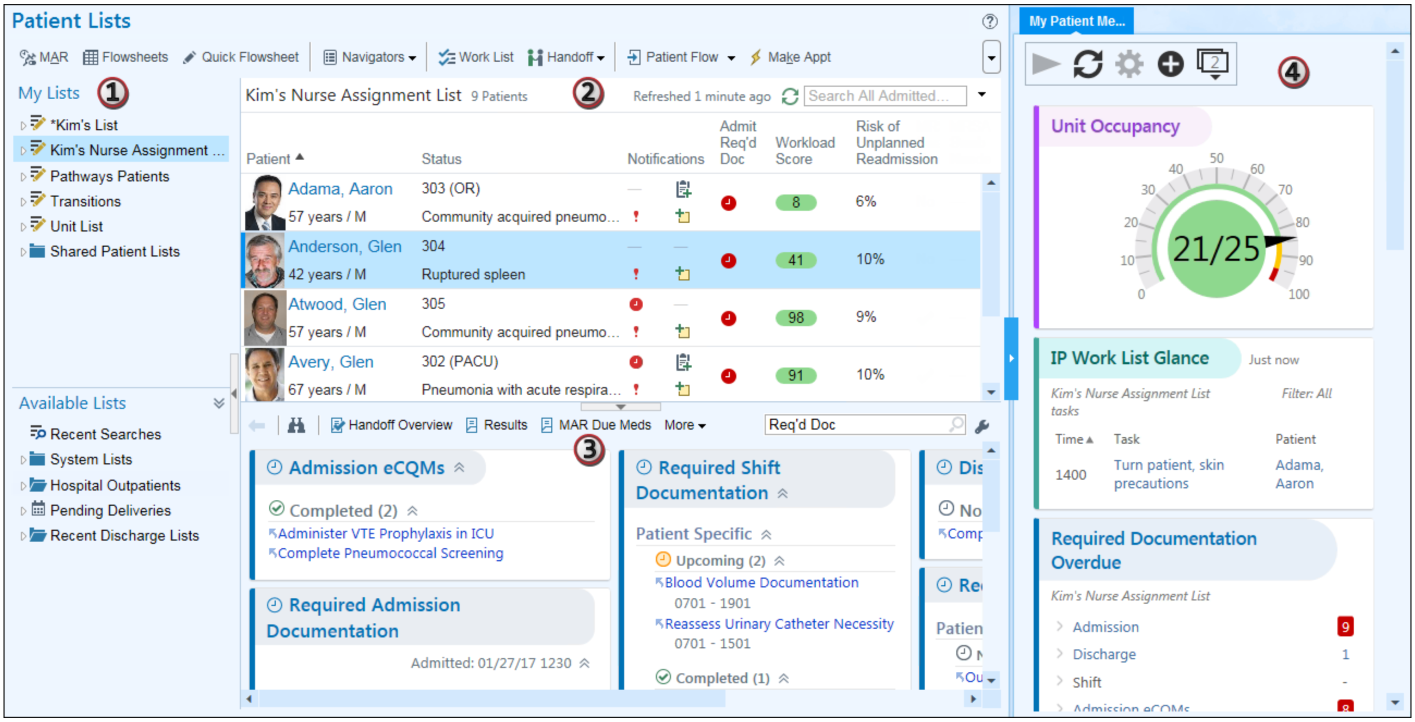
Patient Lists Setup and Support Guide

The Patient Lists activity is a central hub for clinicians to see the patients in their unit and across an entire facility. From this activity, nurses can get their assignments for the coming shift, physicians can designate themselves as a patient's attending provider, and therapists can see which patients in a hospital have a consult order.

Clinicians navigate the Patient Lists activity using four main panes:



1. The Directory pane, a list of all the patient lists that a clinician can access. This pane is divided into two sections:
   - The My Lists section shows all of a clinician's My Lists and shared lists.
   - The Available Lists section shows all of the system lists and custom lists that a clinician has access to.
2. The List pane, which shows all the patients on the selected patient list along with columns of information that a clinician might find helpful.
3. The Report pane, which shows a report when a clinician selects a patient in the List pane.
4. The Radar sidebar, which can include:
   - Components that show stats, such as unit occupancy, or other key information.
   - Components that a clinician can use to filter the patient list she is viewing. For example, when the sidebar indicates that there are 3 patients with new results, the clinician can click that filter in the sidebar to show only those 3 patients in the List pane.

Within the Patient Lists activity, clinicians use three different kinds of lists to view patients. These lists show different patients and can be used for different purposes:

- A My List is a personal list of patients that a clinician creates and maintains for herself. Clinicians generally use My Lists to keep track of patient assignments.
- A shared patient list is a list of patients shared and maintained by multiple clinicians. Clinicians who share

responsibility for a group of patients might use a shared patient list to keep track of those patients rather than update all their My Lists individually.

- A system list is an administrator-created list of all patients within the system who meet certain criteria. Clinicians who need to keep track of patients with orders for respiratory therapy, for instance, can use one list to quickly find all such patients in a facility.

When looking at a patient list, clinicians can see information about each patient, such as the patient's name, primary diagnoses, and room and bed. This information is contained within columns or column blocks, which administrators can customize to show information clinicians need to know about the patient. For example, some clinicians might need a column that indicates whether a patient has new notes attached to his chart, while other clinicians might find a column that shows whether a patient is currently in isolation more useful.

If a clinician needs to find a specific patient and isn't sure which list the patient belongs to, or if the patient is on a list that is unwieldy to browse, she can use the Patient Lists search box to locate the patient. This search box, located in the List pane toolbar, searches the patient list the clinician is currently viewing. When the clinician selects the arrow button to the right of the search box, she can opt to search all of her lists, select other lists to search, or search her current location.

After a clinician clicks once on the name of a patient in a list, she can look at the Report pane to see a more detailed overview of the patient's current state. Reports might show information such as the patient's treatment team, last taken vitals, or orders requiring cosign. For more information about reports, refer to the Print Groups and Reports Setup and Support Guide.

When it's time to take action on a patient, the clinician can double-click that patient's row to open the patient's chart.

In the Foundation System
The Patient Lists activity is fully configured in the Foundation System. Go to the Foundation Hosted environment to try out the workflows described in this guide.

Improve Clinician Efficiency in Patient Lists

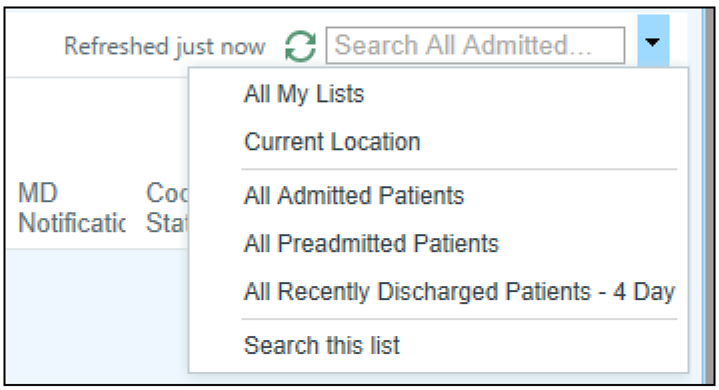
The Patient Lists activity is often the starting point for patient documentation. You can make clinicians more efficient by:

- Making it easier to document on a patient without first opening the chart
- Organizing and highlighting important information

This chapter includes our recommendations for several features that make Patient Lists more actionable and usable.

Expand the Scope of Patient Searches

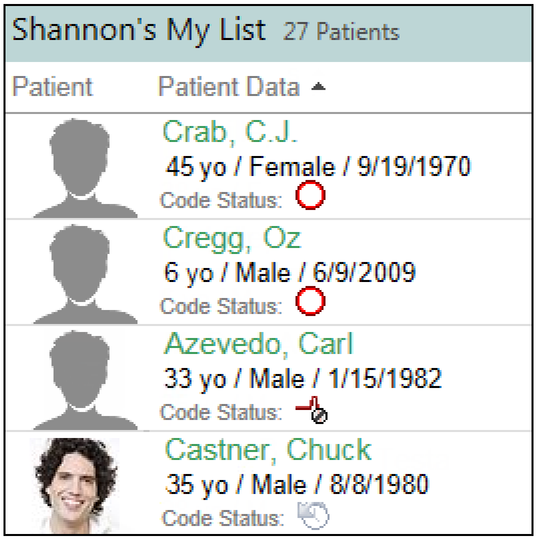
Clinicians can use the search bar to quickly find patients without leaving the activity. However, if you don't configure the search, clinicians can't search for recently discharged or pre-admitted patients. To make it easier to find patients, we recommend configuring the search so that it finds any matching admitted, pre-admitted, or recently discharged patient.



For information about configuring the search scope, refer to the Configure the Patient List Search topic.

Put More Information in Patient Lists Without Adding More Columns

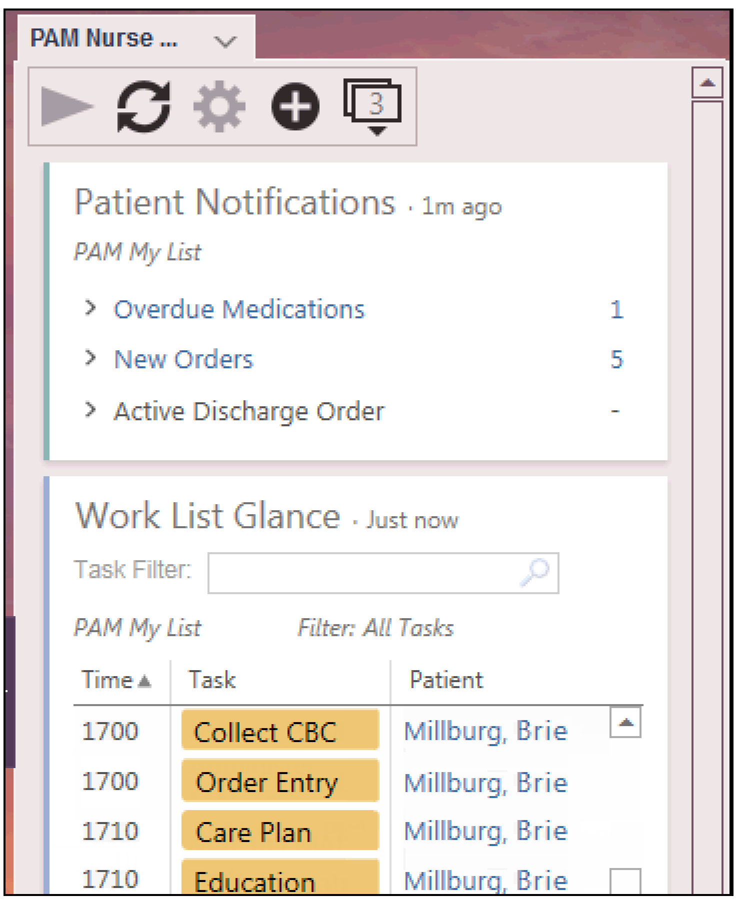
Column blocks present a lot of information without cluttering the workspace with a lot of columns. For example, you can show a patient's name, sex, date of birth, age, and code status in one column block so that all of that information is still available while also freeing up space for other columns.



Refer to the Use Column Blocks to Better Organize Your Patient Lists topic for more information. To see Epic-released column blocks, refer to the Column Block Catalog topic.

Include Actionable Information and Filters in the Sidebar

Make it easier to filter lists and take action by putting outstanding tasks in the sidebar. With Radar-based patient list sidebars, clinicians can quickly filter patient lists to find patients who have particular notifications or who need specific documentation. Using sidebar reports also allows you to simplify patient lists by removing some columns, such as those related to required documentation.



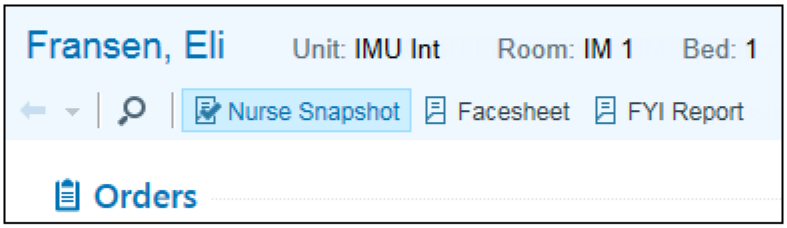
We recommend giving nurses and physicians access to the Radar sidebar in the Patient Lists activity. We also recommend that you use one of the following Epic-released dashboards as the default sidebar dashboard for your clinicians:

- 34257-IP Nurse Sidebar Dashboard
- 34258-IP Physician Sidebar Dashboard

For more information, refer to the Give Clinicians Access to the Radar Sidebar topic.

Separate Patient List Reports to Avoid Scrolling

Patient List reports can provide useful information like vital signs, intake and output, charges, and lab results. But because Patient List reports take up only part of the screen, long reports with lots of information require clinicians to scroll to find what they're looking for. We recommend separating Patient List reports based on the kind of information in the report. Then, clinicians can use the toolbar to select the report they need.



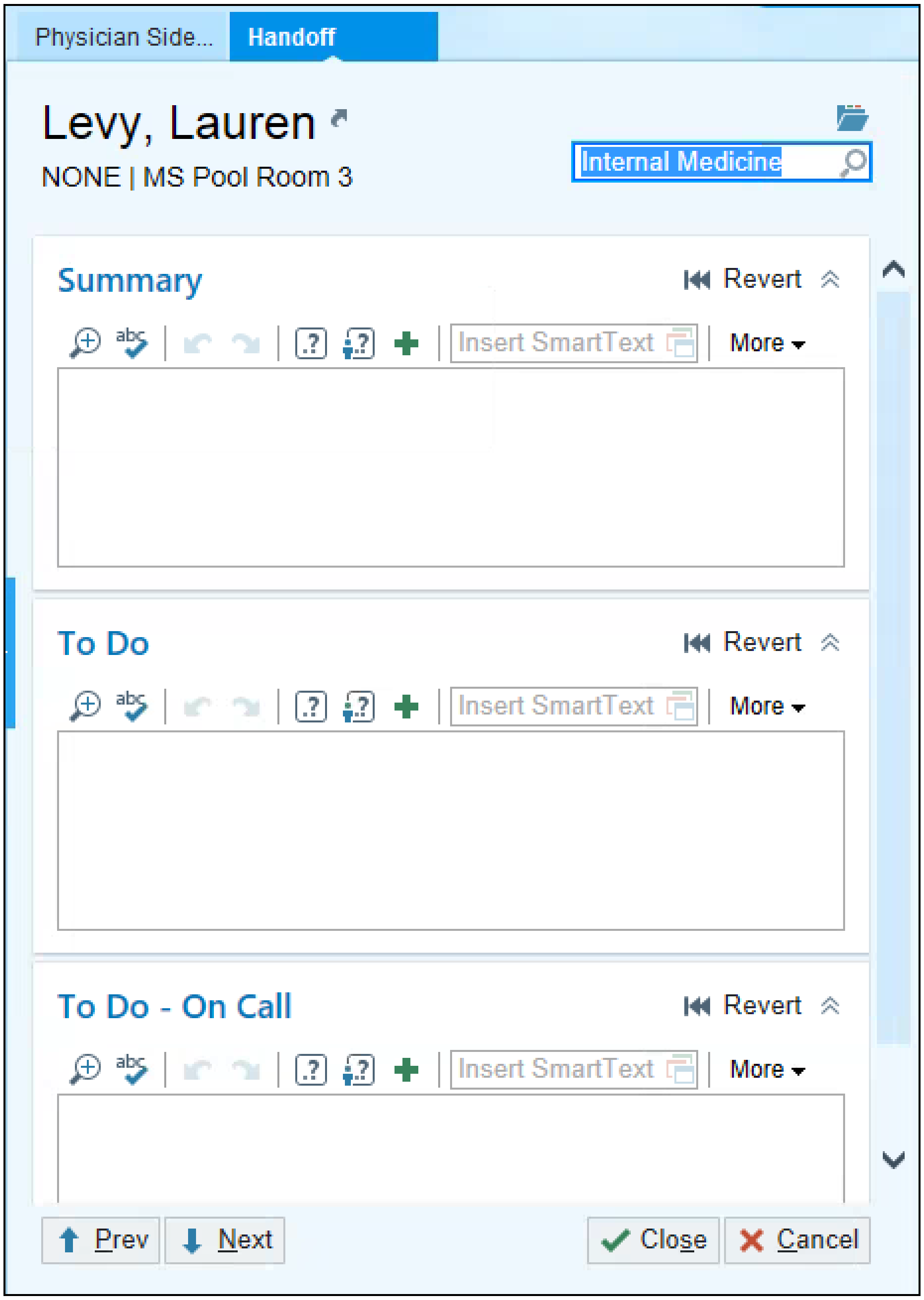
For example, in the Foundation System, the following reports are used for most inpatient clinicians:

- 2001001-IP Vitals Patient List
- 2001006-IP 72h I/O
- 3040000029-IP Labs 72h
- 20010003-IP Current IP Meds
- 30410003-IP Handoff Report
- 3040000026-IP Orders Needing Cosign
- 3040000102-IP Facesheet
- 30447255001-IP All Signed and Held Orders
- 30410005401-IP Physician My Charges
- 48211-IP Physician Checklist

For more information, refer to the Configure Patient List Reports topic.

Allow Clinicians to Create Handoff Reports in Patient Lists

Handoff reports make it easier for clinicians to communicate time-sensitive information between shifts. Unlike the sign out report, handoff reports are service-specific and can be configured to include only those sections that are relevant to the patient's care. You can make handoff reports available in Patient Lists so that when a clinician clicks Write Handoff, the report appears in the sidebar. Clinicians can quickly move to the next patient by clicking Next.

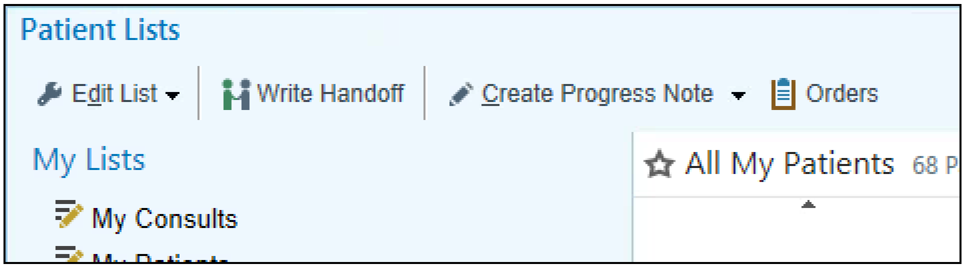


For more information, refer to the Handoff Setup and Support Guide.

Clean Up the Patient Lists Toolbar

Adding activities to the Patient Lists menu makes it easier to take action directly from a patient list. For example, a physician can select a patient in a list and create a progress note with one click instead of opening the chart to create the note. However, if you've been live for a while, the Patient Lists menu might have been expanded to include activities that aren't used frequently. Consider removing some buttons to make it easier for clinicians to find the actions they're most likely to take from Patient Lists.

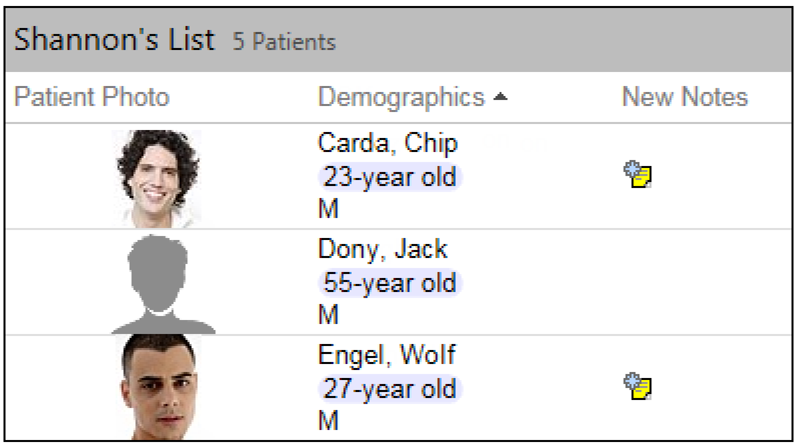
In the Foundation System, the Patient Lists activity menu (1349100-MODEL_IP_MT_PATLIST_PHYSICIAN) contains only four buttons:



For information about removing buttons from an activity toolbar, refer to the Add or Remove Buttons from the Activity Toolbar topic. Note that you might be using role-based overrides for activity menus, so you might need to update the override menu. To see the overrides being used for particular users, use the Menu Summary Activity.

Add Patient Photos

Patient photos make it easier for clinicians to quickly confirm they're looking at information for the correct patient.



The ONC's September 2016 Report on the Safe Use of Pick Lists in Ambulatory Care Settings: Issues and Recommended Solutions for Improved Usability in Patient Selection and Medication Ordering highlights the benefits of including patient photos in the EHR: "Evidence showed that providers often experience heavy cognitive load and frequent disruptions that increase the likelihood of a wrong-patient error. Emerging evidence-based functionality, such as adding a photo to the patient record to facilitate provider recall, should be used to reduce wrong-patient errors." (page 18)

Refer to the Add Patient Photos to a Patient List topic for information about adding patient photos to your patient lists.

Patient Lists Setup: Essentials

In this section, we'll cover everything that you need to do to start using the Patient Lists activity. This includes steps to take to make the Patient Lists activity available to your users and how to configure the Patient Lists activity to match our recommendations.

For information about setting up printing for the Patient Lists activity, refer to the Patient Lists Setup: Printing section of this guide.

Give Users Necessary Patient Lists Security Points

To make the Patient Lists activity available to users, you need to give them the appropriate security. Both the clinicians who use the Patient Lists activity and the users who create and maintain your patient lists need security points added to their security classes. In addition to granting access to basic features of the activity, there are a number of security points that control what buttons or activities are available from within the Patient Lists activity.

> The Sign-In activity is used by clinicians who work directly with a small number of patients, such as registered nurses and therapists, or who work on a provider team, such as residents. Access to the Sign-In activity is controlled by department and profile settings rather than security points. For more information about giving clinicians access to the Sign-In activity, refer to the Give Users Access to the Sign-In Activity topic.

Security Point Name	Security Point Number	Access Granted
Patient List Administrator	1 (Inpatient) 109 (EpicCare)	Allows users to create My Lists, system lists, and system list groupers. Allows users to edit all lists. Allows users to select the "Available to all users" checkbox on the Advanced tab for My Lists, which allows them to share a patient list with all other users in the system. Allows users to remove patients from shared patient lists. Allows users to make patient lists available from the pre-login screen. Note that users must have this security point to create or edit system lists or system list groupers.
Patient Lists	9 (Inpatient) 108 (EpicCare)	Gives users access to the Patient Lists activity. Allows users to create and edit My Lists.
Edit Shared Lists	11 (Inpatient) 91 (EpicCare)	Allows users to add or remove patients on shared patient lists. Allow users to select the "Available to all users" checkbox on the Advanced tab for My Lists, which allows them to share a patient list with all other users in the system. Allows users to remove patients from shared patient lists. Allows users to make patient lists available from the pre-login screen.
Create Patient Staff Relationship	40 (Inpatient)	Gives users access to the Treatment Team option on shortcut menus in the Patient Lists activity.
Patient Label Printing	128 (Inpatient) 492 (EpicCare) 28 (ASAP)	Gives users access to the Patient Label Printing activity that can be accessed from the Patient Lists activity when a user selects a patient or from within a patient's hospital chart. Open the activity by following the path Action > Label Print > Patient Labels.
Print Patient(s) Report from Patient List	143 (Inpatient) 22 (EpicCare)	Gives users access to the Patient Report button in the Patient Lists activity so they can submit batch print jobs from the Patient Lists activity. Security for this feature varies by version. Refer to Give Users a Batch Printing Button in Patient Lists topic for more information.
Edit Provider Team Assignments	271 (Inpatient)	Allows users to assign or remove provider teams from the patient's treatment team in the Patient Lists activity.
Handoff	358 (Inpatient)	Gives users access to the Write Handoff button in the Patient Lists toolbar that allows users to write handoff reports in the Handoff sidebar of the Patient Lists activity.

To add these security points to security classes, open the Security Class Editor in Hyperspace (search: Security Class Editor).

For information about additional security points, refer to the Epic Security Point Dictionary.

Create a My List or Shared Patient List

The My List and shared patient list are two types of lists used in the Patient Lists activity. They have similar functions within the Patient Lists activity. Clinicians use both types of lists to track specific patients and can maintain the lists themselves by adding and removing columns and patients. The main difference between these two types of lists is that a My List is used by a single clinician, while shared patient lists are viewed and maintained by multiple clinicians. A clinician might look at her My List to see the patients she's assigned to that day and then check a shared patient list to see all the patients under the care of her unit at that time.

While a My List is a tool primarily used by clinicians, you might need to create a My List for testing. You might also want to create shared patient lists for your clinicians before going live. Patient Lists with a Type (I ERS 50) of My List or Shared List are typically maintained in your production environment and can't be moved with Content Management. Instead, you can use My List Templates to configure the columns clinicians see, and My List Templates can be migrated using Content Management. For more information about creating My List Templates, refer to the Update Users' My Lists Using My List Templates topic.

> Inpatient nurses tend to want their patient lists sorted by patients' room numbers. Save nurses clicks by making the Room or Room/Bed column the default column for a nurse's patient list to sort on.

To use shared patient lists, you must have the Patient List Personalization license, which is included in the standard EpicCare Inpatient and EpicCare Ambulatory license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

Identify Columns to Add to the List

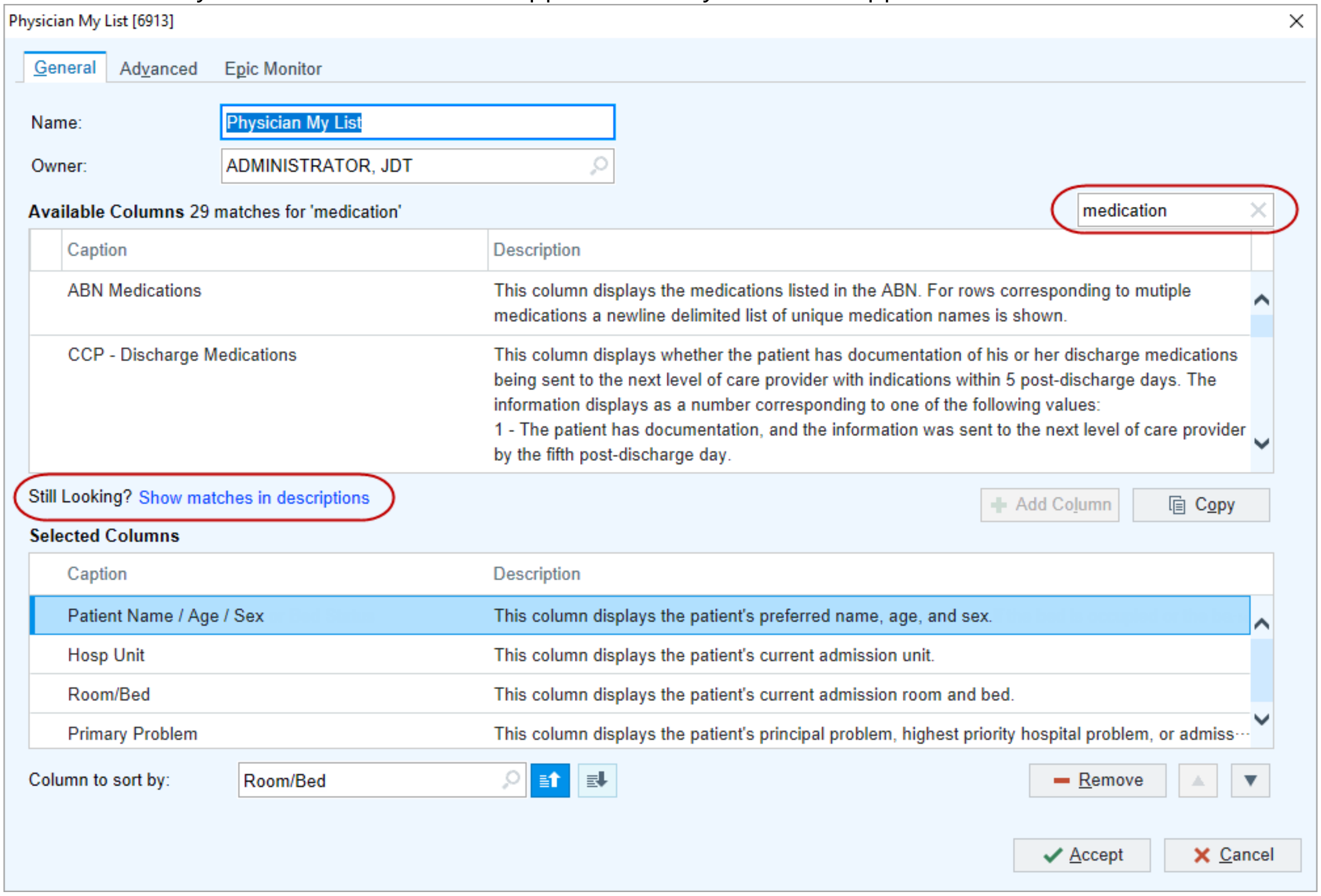
Epic offers a wide variety of report columns to show everything from a patient photo to readmission risk scores. Report columns can be used as released or you can make copies of the columns and customize them to suit the needs of your organization. To search for columns that meet your needs before creating a patient list, refer to the Search for Existing Report Columns topic. For more information about making copies of released columns, refer to the Copy Report Columns for Customization topic. Refer to the Column Block Catalog to review blocks of columns that can be added to a patient list as released.

Create a My List

> You can also create multiple My Lists and system list groupers at the same time using import specification ERS,D,2-Stand Alone Import Specification - ERS, using the following guidelines:
>
> - The Patient List Type (I ERS 50) should be set to 1 or 5. Set it to 1 when importing a My List, whether or not it's shared. Set it to 5 for a system list grouper.
> - The System List Group (I ERS 34005) should be set to 1 when importing a system list grouper and left blank when importing a My List.
>
> Refer to the Standard Import Guide for more information about importing records.

1. In Hyperspace, open the Patient Lists activity.
2. On the toolbar, click the arrow next to Edit List or right-click on an existing My List in the Directory pane.

Select Create My List from the menu that appears. The My List Editor appears.



3. In the Name field, enter an appropriate name for the list, keeping in mind your organization's naming conventions.
4. In the Owner field, your user name appears automatically, but you can enter another user's name to make that person the list's owner. A list's owner is the only person for whom the My List appears in the My Lists section of the Directory pane. The owner can also modify or delete the list. The list appears in the Shared Lists folder of the My Lists section for any other users who have access to the list.
5. Add columns, column blocks, or both to your list in one of the following ways:
   - Find columns to include in the My List by using the search field above the Available Columns table or by using type-to-search within the table. You can search using the column name, key word, or the column ID. When you use the search field, the initial results shown in the table are matches from the captions of available columns. To see any additional matches from the description field of available columns, click the link that appears next to Still Looking? under the Available Columns table.
   - Select a column or column block from the Available Columns table and click Add. The column or column block is removed from the Available Columns table and appears in the Selected Columns table.
   - Click Copy and select a My List template or another patient list. The columns and layout of the selected template or list appear in the Selected Columns table. Any columns that had previously appeared in the Selected Columns table are overwritten by the columns in the My List template or patient list, unless those columns were marked as required in the template.
6. Rearrange elements in the Selected Columns table by selecting the column or column block you want to move and clicking the up or down arrow button.

7. Remove columns or columns blocks in the Selected Columns table by selecting the element you want to remove and clicking Remove.
8. In the Column to sort by (I ERS 34015) field, enter a default column by which to sort the list. The default column can be chosen from the list of currently selected columns. If no default column is selected, the patient list sorts on the first column in the list by default. Patient photo columns cannot be used to sort the list.
    - You can choose whether the column is sorted in an ascending or descending direction by selecting one of the buttons next to the Column to sort by field.
9. Click Accept. The My List appears in the My Patient Lists folder in the Patient Lists folder directory.

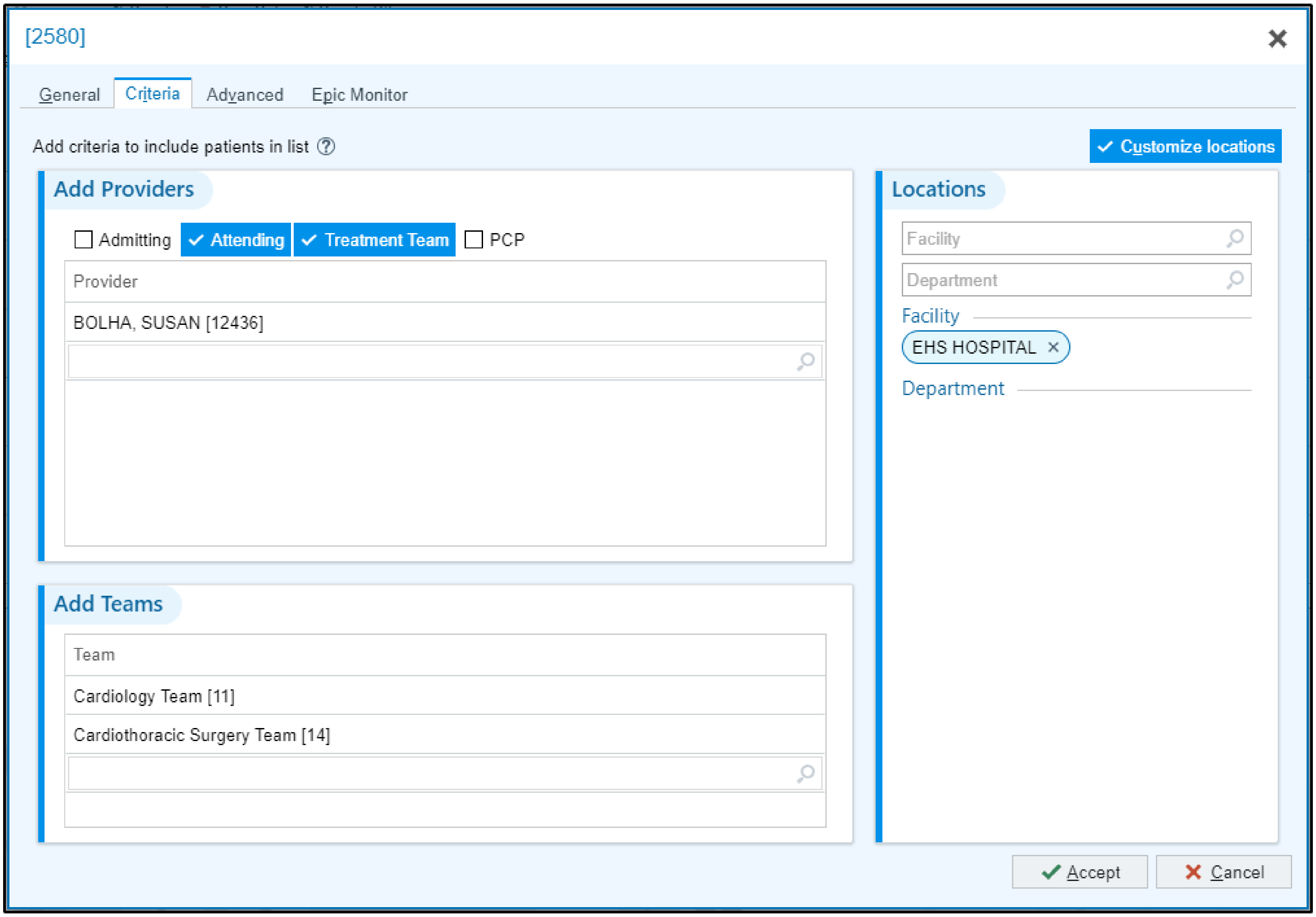
Create a My List Based on Providers or Care Teams

Starting in February 2024

Clinicians can dynamically include the patients of specific providers and teams in their My List using the Criteria tab in the My List Editor. Here, clinicians can create a My List based on a set of providers and teams that can be restricted by locations. The system automatically finds patients associated with these sets, and they appear when a clinician selects the list node in the Patient List activity. This functionality is available by default to all Patient List users.

Clinicians can add criteria when updating an existing My List or when creating a new My List. You can also update a list for clinicians using the same process:

1. In Hyperspace, open the Patient Lists activity.
2. On the toolbar, click the arrow next to Edit List or right-click on an existing My List in the Directory pane. Select Edit Criteria from the menu. The Criteria tab in the My List Editor opens.
3. In the Add Providers section:
    a. Select the provider role checkboxes to specify the relationship between the listed providers and the collected patients, such as "Attending" or "Admitting". These provider role options are independent of one another, but you need to select at least one to find patients.
    b. In the Provider field, enter providers (SER). The list collects all patients assigned to these providers for the specified roles.
4. In the Add Teams section:
    a. In the Team field, enter Provider Care Team (PCT) records. The list collects all patients that listed teams are caring for.
5. In the Locations section:
    a. To filter the patients that will appear on the list by location, select the Customize locations checkbox. Use the Facility (EAF) and Department (DEP) fields to specify which locations the patients appearing on the list are collected from. Facilities may encompass departments, but a single patient appears only once on the list.



Restrict Provider, Team, or Location Criteria

If there are clinicians who should not have access to editing My List criteria, you can restrict access using profile settings starting in February 2024. In previous versions, only provider- and team-based system lists could be restricted by entering a value in the Facility (I PAC 37) or Department (I PAC 43) field.

Use the Build Wizard in Hyperspace to update profile records with provider, team, or location restrictions. If your organization currently restricts system lists based on locations to prevent users from adding patients in other facilities to their lists, you likely want to do this. To get started, open the Build Wizard (search: Build Wizard) and search for feature 340068-Restrict My List Criteria (application: EpicCare Inpatient). There is no need to run the Build Wizard if users should have full access to My List Criteria.

When you run the Build Wizard feature, you can select profiles that should not have access to edit provider or team restrictions in criteria lists. Profiles that already have these restrictions are pre-populated. For location restrictions, profiles that control which Custom List Folders are available to select, and profiles that already have location restrictions are pre-populated. For each profile, you can choose to include or exclude the patients admitted to the facilities you specify. You can also exclude patients who are admitted to specific departments, such as a behavioral health department.

To manually restrict users from editing criteria on My Lists:

1. In Clinical Administration, go to Management Options > Profiles (LPR) and open the profile for users who should have restricted access to edit criteria on My Lists.
2. Go to the Miscellaneous Patient Lists Settings screen.
3. In the Prevent Editing My List Criteria Type (I LPR 34527) field, enter the criteria you want to restrict access to editing.
   - Add 1-Providers to prevent users from editing provider criteria.
   - Add 2-Teams to prevent users from editing care team criteria.
   - Enter 100-All to prevent users from editing criteria on My Lists completely.
   - Leave the field blank if you do not want to restrict access to editing My List Criteria.
4. In the Include or exclude facilities (I LPR 34532) field, enter 0-Exclusive to exclude patients who are admitted to the facilities you list below from list criteria. Enter 1-Inclusive to include those patients in the list criteria.
5. In the Available criteria facilities (I LPR 34533) field, list the facilities that should be included or excluded from list criteria, based on your previous selection. If you want users of this profile to have access to all locations, leave these fields blank. If the Include or exclude facilities (I LPR 34532) field is set and the Available criteria facilities (I LPR 34533) field is left blank, the system checks other levels of the profile hierarchy for available criteria locations.
6. In the Criteria departments to exclude (I LPR 34534) field, list departments to exclude from list criteria.

Create a Shared Patient List

To create a shared patient list, you must first create a My List, as outlined above.

! To prevent too many My Lists from appearing in all users' Shared Patient Lists folder, only users with one of the following security points can make a My List available to all other users:

- Inpatient security point 1-Patient List Administrator
- Inpatient security point 11-Edit Shared Lists
- EpicCare security point 109-Patient List Administrator
- EpicCare security point 91-Shared Patient Lists Editor

1. Select the My List you want to share.
2. On the toolbar, click the arrow next to Edit List or right-click on an existing My List in the Directory pane. Select Properties from the menu that appears. The My List Editor appears.
3. Click the Advanced tab.
   a. To make the list available to everyone at your organization, select the Available to all users option.
   b. To make the list available only to certain users, in the User column of the Allow access to any of the following pane, enter the names or user IDs of the users you want to have access to this list.
   c. To show the number of patients on the list in the Directory pane, select the Show number of patients in this list check box.
4. In the Access Level column, select the level of access you want to give that user. The levels of access are:
   - View Only: The user can open the list but cannot modify it in any way.

- Add/Remove Patients: The user can add or remove patients to the list.
- Modify Properties: The user can modify the list, in addition to the previously mentioned abilities.
- Change Accessibility: The user can change the access level for herself and other users, in addition to the previously mentioned abilities.
- Delete Patient List: The user can delete the list, in addition to the previously mentioned abilities.

5. When you have added users and selected their access levels, click Accept. The My List is now a shared patient list and appears in the Shared Patient Lists folder in the Directory pane. The Shared Patient Lists folder appears only when a user has access to one or more shared patient lists. The list continues to appear in the My Lists section of the Directory pane for the list owner.

Delete a My List or Shared Patient List

Use these steps to delete individual lists. To delete multiple My Lists or shared lists from your system, refer to the Identify Patient List Records That Need Updates topic.

1. Right click your My List or shared patient list in the Directory pane. Select Delete My List from the menu that appears. A confirmation window appears.
2. Click Yes to confirm that you want to permanently delete this list. The list is removed from the Directory pane, and it cannot be restored.

Create a Shortcut to a System List

Copying a system list into a My List or shared patient list adds a link, called a shortcut, to the system list. When a clinician clicks this shortcut, the system list opens. Using shortcuts, clinicians can find all of the system lists they use on a regular basis in one place. The patients from the system list shortcut appear on the My List or shared list, but are updated whenever the system list is updated. There are three ways to create a shortcut to a system list:

Drag and Drop

Drag the system list you want to copy from the Available Lists section of the Directory pane and drop it on the My List or shared list.

Send To

1. Right-click the system list you want to copy.
2. Select Send To and select the My List in which you want the system list shortcut.

Copy and Paste

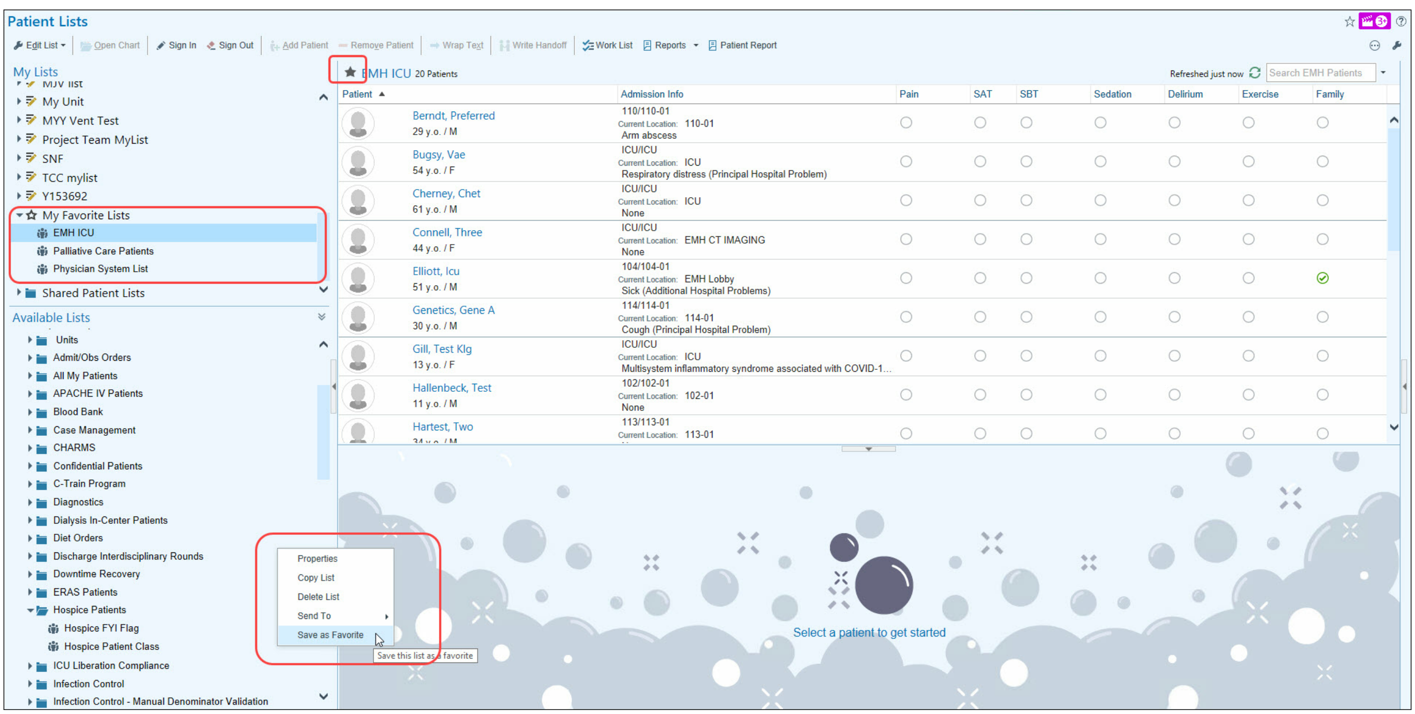
1. Right-click the system list you want to copy. Select Copy System List from the menu that appears.
2. Right-click the My List or shared list in which you want the system list shortcut. Select Paste List from the menu that appears. The system list appears in your My List as a shortcut.

Favorite Your Most-Used System Lists

As an alternative to creating shortcuts to system lists in your My Lists, it is also possible to favorite system lists you refer to often or want to be able to find easily in the future. The system lists you favorite appear in My Favorite Lists folder in the My Lists section of the Directory pane. The My Favorite Lists folder doesn't appear in the My Lists section until you add the first system list to it.

To use favoriting, you must not have item protection turned on for the entire User (EMP) master file or for the IP Patient Favorite Lists (I EMP 34066) item. Note that only users with Data Courier security point 16-Data Courier Access can verify your settings and perform any necessary modifications to item protection.

- In text, enter d ^CSMDC to access the Data Courier Administrator's Menu.
- Select Edit Configuration (EGC) and enter the configuration you want to modify. Select Protection Setup to open the Data Courier Record Protection screen.
    - If the Item protection include/exclude flag (I EGC 54900) field is set to Include, look for the EMP master file in the INI (I ECG 54910) field. If EMP is listed, make sure that the Item List (I ECG 54921) field isn't set to ALL or doesn't contain I EMP 34066.
    - If the Item protection include/exclude flag (I EGC 54900) field is set to Exclude, look for the EMP master file in the INI (I ECG 54910) field. If EMP is listed, make sure that the Item List (I ECG 54921) field either is set to ALL or contains I EMP 34066.



1. Right-click the system list in the Directory pane and select Save as Favorite or open the system list you want to favorite and click the star next to the system list's name in the List pane. The system list is added to your My Favorite Lists folder.
2. To remove a system list from the My Favorite Lists folder, right-click the system list in the Directory pane and select Remove from Favorites or open the system list and click the star again.

Add a Patient to a My List or Shared Patient List

1. Select a My List or shared patient list from the Directory pane. On the Activity toolbar, click Add Patient. The Patient Lookup window appears.
2. Enter the patient's name or MRN in the Name/MRN field and click Find Patient. The Patient Select window appears.
3. Select the name of the patient you want to add to your list. Click Accept. The patient is now listed on your My List or shared patient list.

Remove a Patient from a My List or Shared Patient List

1. On your My List or shared patient list, select the patient you want to remove from the list.
2. In the Activity toolbar, click Remove Patient. A window appears asking you to confirm your choice. You cannot remove patients that are included in your My List as a shortcut to a system list.
3. Click Yes to confirm that you want to remove this patient. The patient is removed from your list.

Create a System List

A system list is a type of list used in the Patient Lists activity to create lists of patients throughout an entire hospital who share certain traits. A system list of patients with an ordered respiratory therapy consultation is included in the Foundation System, for example, as is a list of patients currently taking warfarin. Such lists are helpful for clinicians who need to know about patients across a variety of units, such as respiratory therapists. For a full list of system lists included in the Foundation System, refer to the Foundation Hosted environment.

System lists differ from My Lists in a few important ways. System lists are created by administrators, not clinicians. Patients cannot be added and removed from system lists the way they can from My Lists and shared patient lists. A patient either meets a system list's criteria and is included in the list, or he does not meet the criteria and is not included.

A system list is composed of two parts: a system list grouper and a system list.

- The system list grouper determines where the system list appears in the Directory pane and which columns appear when viewing the system list.
- The system list itself determines what criteria are necessary for a patient to be included.

You can adjust the access of both system lists and system list groupers to determine who can see the system list and the folder that holds it. You can change the system list filters to adjust the patients that appear on a system list. If a specific system list or system list grouper is no longer necessary for your organization, you can delete it. Starting in May 2022, for cases where the correct patients cannot all be pulled into one list with the filters in the system list editor, you can combine multiple individual system lists into one list.

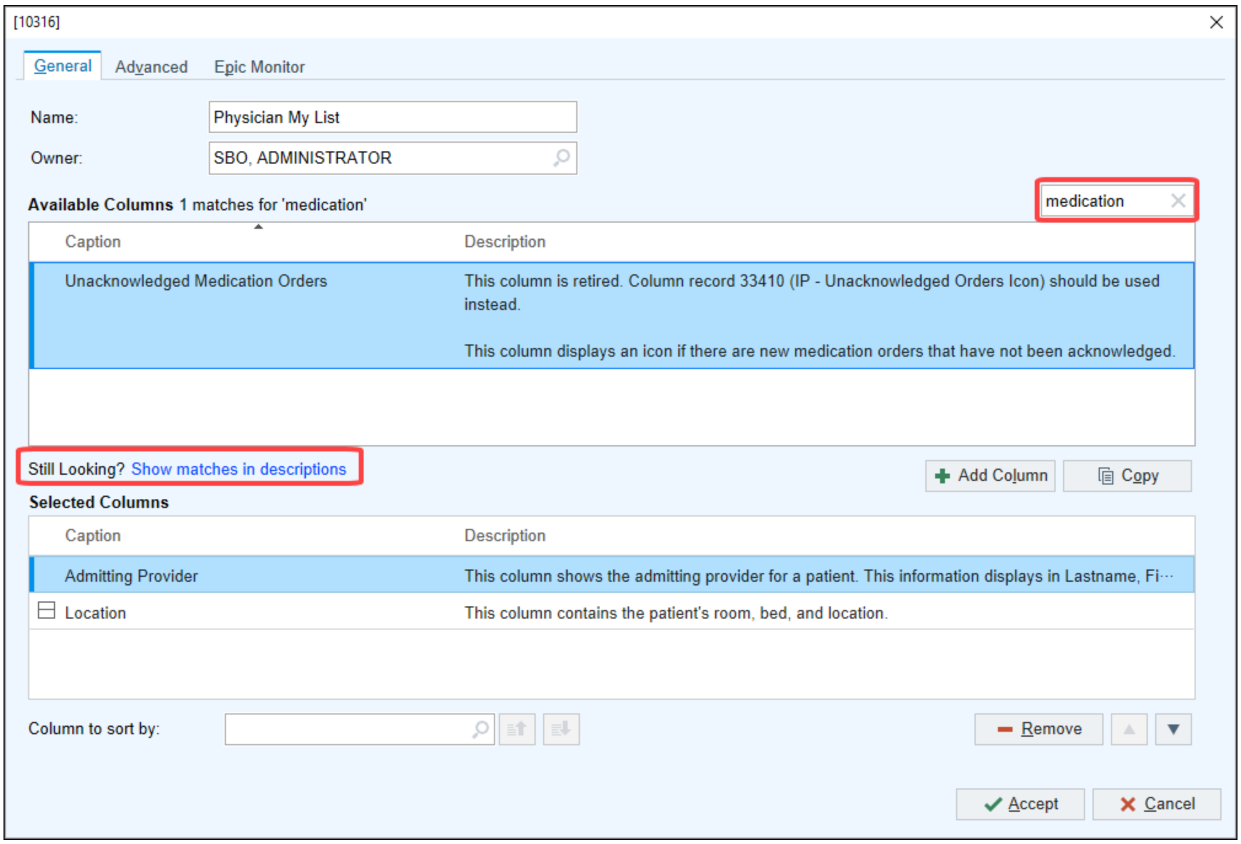
Create a System List Grouper

Some of the fields listed below don't appear if you don't have the Patient List Personalization license, which is included in the standard EpicCare Inpatient and EpicCare Ambulatory license. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

1. In Hyperspace, open the Patient Lists activity.
2. On the toolbar, click the arrow next to Edit List or right-click on the main System List folder in the Directory pane. Select Create System List Grouper from the menu that appears. The My List Editor appears.
3. In the Name field, enter an appropriate name for the system list grouper, keeping in mind your organization's naming conventions.
4. In the Owner field, your name appears automatically, but you can enter another user's name to define that

person as the owner. The owner of the grouper can modify or delete it.

5. To copy the layout of an existing patient list instead of building the layout from scratch:
   - Click Copy. The Choose columns window appears.
   - Select a My List template or another patient list. The columns and layout of the selected template or list appear in the Selected Columns table.
6. To add columns or column blocks to your list:
   a. Find columns to include in the system list by using the search field above the Available Columns table or by using type-to-search within the table. You can search using the column name, key word, or the column ID. When you use the search field, the initial results shown in the table are matches from the captions of the available columns. To see any additional matches from the description field of available columns, click the link that appears next to Still Looking? under the Available Columns table.



   b. Select a column or column block from the Available Columns table and click Add. The column or column block is removed from the Available Columns table and appears in the Selected Columns table. Keep in mind that too many columns in a system list can reduce system performance, so be sure to add only columns needed for users' workflows.
7. Rearrange columns or column blocks in the Selected Columns table by selecting the element you want to move and clicking the up or down arrow button.
8. Remove columns or column blocks in the Selected Columns table by selecting the element you want to remove and clicking Remove.
9. Select the appropriate list from the Patient List Name column and click Accept. The columns from that patient list appear in the Selected Columns list.
10. Click Accept. A folder with the name of the list grouper appears within the System Lists folder in the Directory pane.

Determine Who Has Access to a System List Grouper

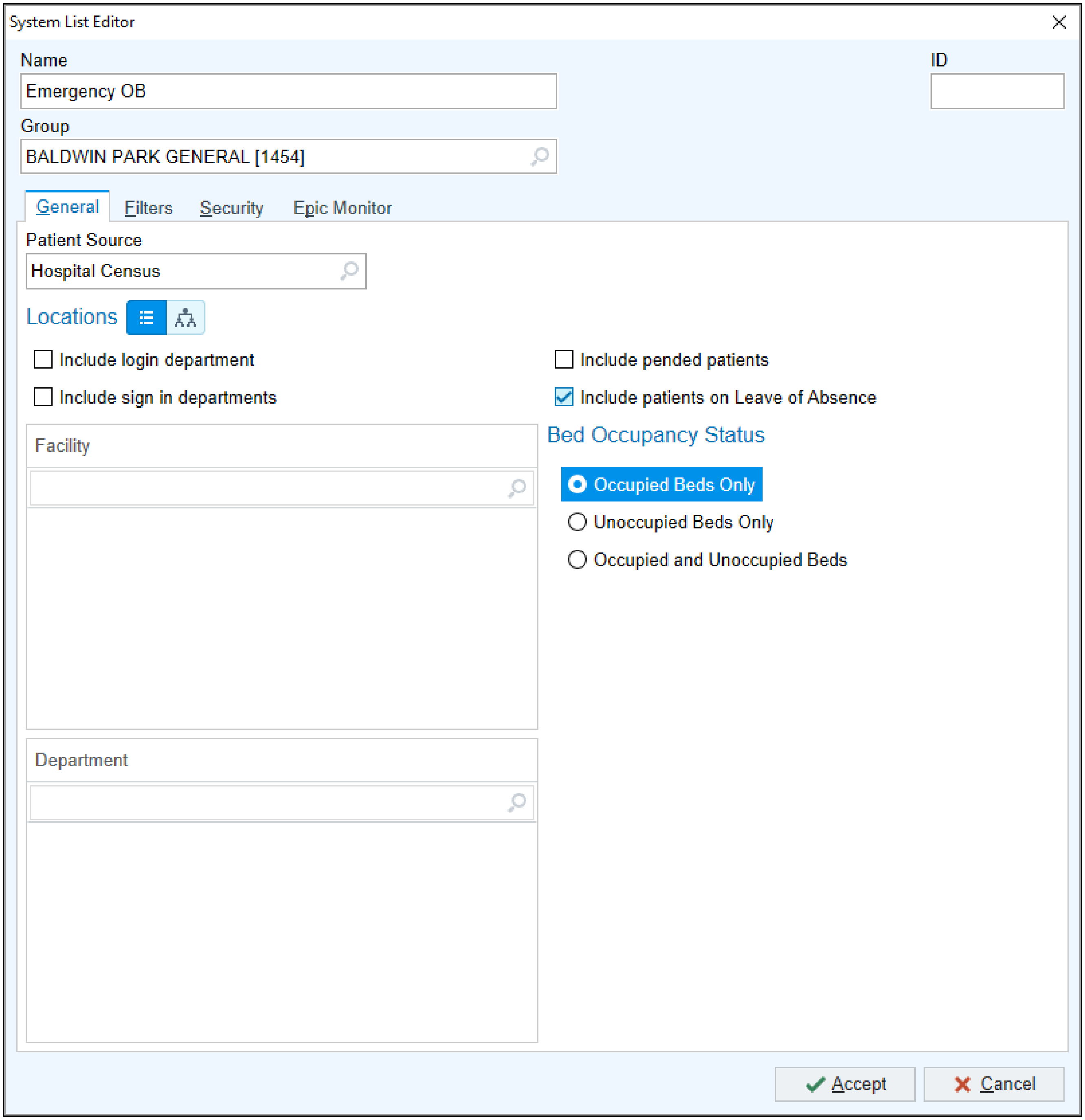
Clinicians with access to a system list grouper have access to any system lists grouped in the system list grouper.

1. In the New List window of your system list grouper, click the Advanced tab. Check the Available to all users check box to make this system list grouper accessible to every user in your organization.
2. Check the Use composite security from child lists check box to use the security settings of the system lists within this system list grouper to determine the system list's security level. Note that the settings of a system list grouper override the security settings in an individual system list. If a user doesn't have access to your system list grouper, she will not have access to any of the system lists included in it.
3. Using fields under the Allow access heading, you can limit access to the system list to any of the following settings:
   - Workstation. Adding specific workstations makes the system list visible at a specific workstation, regardless of the user looking at it.
   - User. Adding specific users allows them to view the system list no matter where they are.
   - Role. Adding specific roles allows any cardiologist, for instance, to view the system list no matter where they are.
   - Service Area. Adding specific service areas makes the system list visible to any users with that service area listed in the EpicCare authorized service areas (I EMP 17700) field in User Security.
4. When you have finished selecting your security settings, click Accept.

Create a System List

You can import provider system list (PAC) records using import specification PAC,1000-Phys Reg System List to quickly create or edit multiple system list records. Refer to the Standard Import Guide for more information about importing records. To create individual system lists of other types:

1. On the Activity toolbar, click the arrow next to Edit List. Select Create System List from the menu that appears. The System List Editor appears.



2. In the Name field, enter an appropriate name for the system list, keeping in mind your organization's naming conventions.
3. Optionally enter an ID for the system list, keeping in mind your organization's conventions and ID ranges. Leave this field blank to use a system-generated ID.
4. In the Group field, select the system list grouper under which you want this system list to appear in the Directory pane.
5. The General tab determines which populations are included in or excluded from your list in the Patient Lists activity and the Schedule with Patient Lists activity:
   a. In the Patient Source field, click the Selection button and select one of the listed options:
      - A Current Location list contains patients in a physical location.
      - A Hospital Census list contains patients admitted to a specific location.

        - An Orders list contains patients with a specific medication or procedure order.
        - A Providers list contains patients who share a specific physician in a specified role or roles, such as attending provider or treatment team member. A row appears in the Provider grid for "Self" automatically, which creates a list that populates patients assigned to yourself in the specified role. Note that when this type of system list is added to a My List and then shared with another provider, the list continues to show the patients assigned to the provider who created the list, not the user who is viewing it.
        - A Teams list contains patients with the same Provider Team.
        - A Transfer Center by Destination list contains patients who have Transfer Center requests for specific destinations.
        - A Transfer Center by Region list contains patients who have Transfer Center requests for specific transfer center regions. Choose this source if you want to show patients without a destination.
    b. In the Locations directory, enter each location you want the system to include when building your list in the Location grid or, in tree mode, select the check box next to each location you want the system to include. Note that selecting a location with sub-areas causes the system to automatically include all those sub-areas as well.
    c. To include patients based on a user's login department, select the Include login department checkbox. You can use this option to create a My Unit list that will always be accurate for users who might log in to more than one department.
    d. To include patients based on a user's sign-in department, select the Include sign in departments checkbox. Use this option only if your organization uses Sign-In.
    e. To include pended patients, select the Include pended patients (I PAC 34100) check box. Selecting this box includes both pending admissions and pending transfers.
    f. To include patients who are on a leave of absence, select the Include patients on Leave of Absence checkbox.
6. Open the Filters tab.
7. To choose an item to filter on, select an item from the Available Filter Items directory and click Add. The Filter Configuration window appears.
8. Depending on the filter you select, the Filter Configuration window shows either a list of values or an empty grid.
    - For filters showing a list of values, select the check box next to each value on which you want to filter, keeping in mind that any records matching one or more of the values will be included in (or excluded from) the list. Select as many values as appropriate.
    - For filters showing an empty grid, enter free text, use completion matching, or click the Selection button to enter the appropriate values.
9. Select the Include/Exclude cases with no value for this item check box to filter on items without an assigned value as well.
10. Click Accept. The Filter Configuration window closes, and your selected filter appears in the Applied Filters list.
11. Click the X icon in a filter's card to remove the filter from the Applied Filters. Click the pencil icon to edit the filter.
12. When you have finished setting your filters, click Accept. A list appears within the system list grouper

folder in the Directory pane.

Set the Access for a System List

1. Click the Security tab.
2. Check the Available to all users check box to make this system list accessible to every user in your organization. Otherwise, you can limit access to the system list using the fields below the heading Allow access to any of the following:
    - Workstation. Adding specific workstations makes the system list visible at a specific workstation, regardless of the user looking at it.
    - User. Adding specific users allows them to view the system list no matter where they are.
    - Role. Adding specific roles allows any cardiologist, for instance, to view the system list no matter where they are.
    - Service Area. Adding specific service areas makes the system list visible to any users with that service area listed in their EpicCare authorized service areas (I EMP 17700) in User Security.
3. To prevent the system list from appearing in the Directory pane of the Patient Lists activity and Schedule with Patient Lists activity for all users except administrators, select the Show only to administrators checkbox. Users with access to this list on the Security tab can still search the list to find patients. Administrators must have one of the following security points to see hidden system lists:
    a. Inpatient security point 1-Patient List Administrator
    b. EpicCare security point 109-Patient List Administrator
4. Select the Available at login screen check box to make the system list available from the login screen.
5. When you have finished selecting your security settings, click Accept. Your system list appears within the appropriate System List folder in the Directory pane.

Change the System List Filters for a System List

You can control which patients appear on a system list using filters you create in the Column Editor or using medication- or procedure-based system list filters you create in EMR System Definitions. This topic gives instructions for adding or removing the filters created in the Column Editor. For more information about creating system list filters in the Column Editor, refer to the Create Filters for System Lists topic. For information about creating medication- or procedure-based system list filters, refer to the Add Patients with Certain Orders to Lists Automatically topic.

To add or remove a system list filter from an existing system list:

1. In Hyperspace, go to the Patient Lists activity.
2. In the Available Lists section of the Directory pane, right-click the system list you want to edit and select Properties from the menu that appears. The System List Editor appears.
3. To remove a filter from a system list, click the X icon in the right corner of the filter's card.
4. To add a new filter to a system list:
    a. On the Filters tab, choose a system list filter to use with your list and click Add. The Filter Configuration window appears.
    b. Depending on the filter you select, the Filter Configuration window shows either a list of values or an empty grid.
        - For filters showing a list of values, select the check box next to each value on which you want to filter, keeping in mind that any records matching one or more of the values will be

included in (or excluded from) the list. Select as many values as appropriate.

  - For filters showing an empty grid, enter free text, use completion matching, or click the Selection button to enter the appropriate values.

   c. Select the Include/Exclude cases with no value for this item check box to filter on items without an assigned value as well.
   d. Click Accept. The Filter Configuration window closes, and your selected filter appears in the Applied Filters list.

5. When you have finished setting your filters, click Accept. The new filter is applied to your system list.

Rebuild your system list to update the filters applied to your system list by using one of the following utilities:

- Rebuild Orders System Lists
- Rebuild Treatment Team System Lists

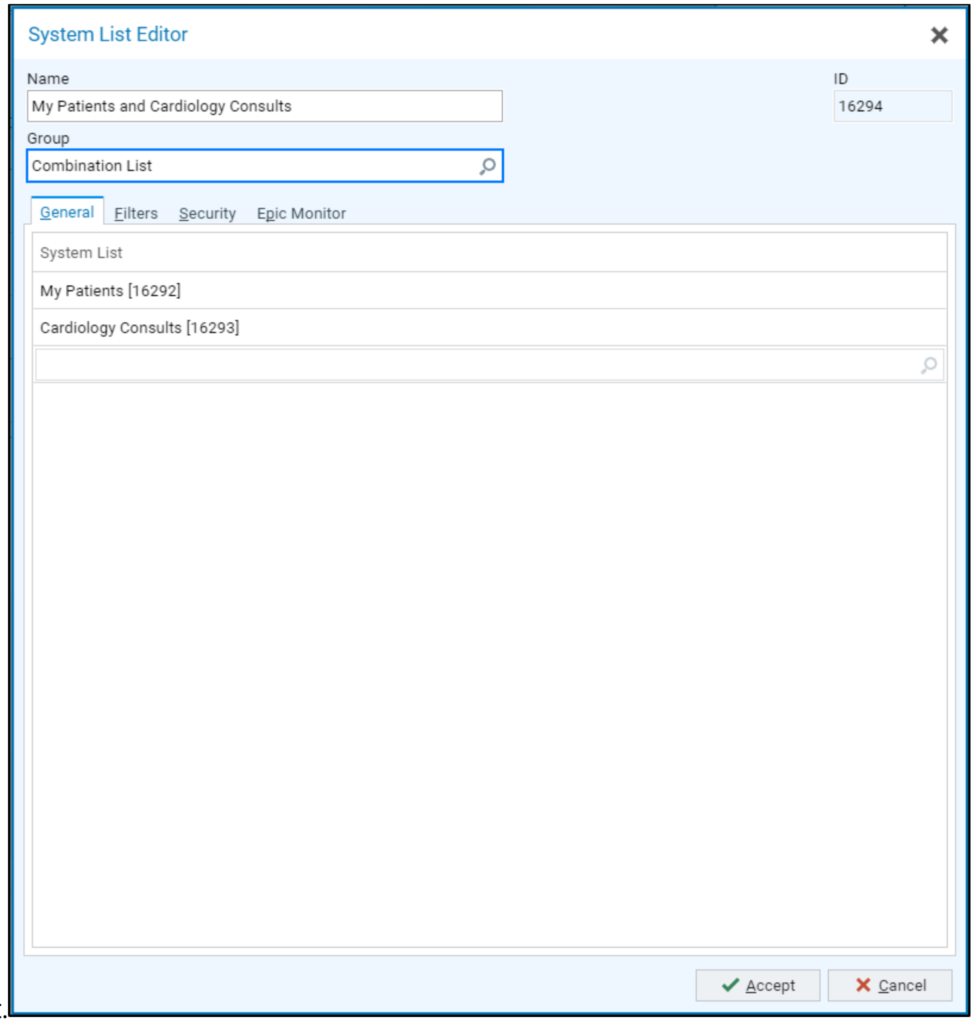
To access these utilities in Clinical Administration, select the utility for the type of system list you want to rebuild and follow the path:

- Rebuild Orders System Lists: Management Options > Utilities > Application Utilities > Orders.
  - In May 2024 and earlier, follow this path: Management Options > Utilities > Orders.
- Rebuild Treatment Team System Lists: Management Options > Utilities > Clinical Utilities > Miscellaneous Clinical.

Create a Combination System List

You can combine system lists to create a combination list that users can add to their My Lists. Creating a combination of different system lists means that clinicians can have a list of all the patients they need in one place that they can easily find and add to their My Lists. For example, if a provider wants a list of all patients with cardiology consults as well as their current patients it would require two system lists, one with a Teams patient source and one with a Providers patient source. If you create a combination list for two or more system lists, the provider needs to add and check only one list.

1. In Hyperspace, open the Patient Lists activity.
2. Find or create a custom list folder. Leave the Patient Search Programming Point (I ERS 34200) field blank and set the System List Property Page (I ERS 34206) field to 8-Combination List.
3. Right-click your Custom List Folder and select the option to create a grouper.
4. Right-click your grouper and select the option to create a System List.
5. On the General tab, add the system lists you want in your combination list. Complete other information as



you would for a system list.

6. Optionally, further customize your combination list by editing the Filters, Security, and Epic Monitor tabs as you would in a regular system list.

Delete a System List Grouper

Use these steps to delete individual system list groupers. To delete multiple groupers from your system, refer to the Identify Patient List Records That Need Updates topic.

1. In Hyperspace, open the Patient Lists activity.
2. In the Directory pane, select the folder for the system list grouper you want to delete.
3. On the toolbar, click the arrow next to Edit List. Select Remove from the menu that appears. You can also right click the folder and select Delete System List. A confirmation window appears.
4. Click Delete to confirm that you want to delete this list grouper. The list grouper is deleted and the system list folder is removed from the Directory pane. System lists from the deleted system list grouper are moved to the default system list folder.

Delete a System List

Use these steps to delete individual system lists. To delete multiple system lists from your system, refer to the Identify Patient List Records That Need Updates topic.

1. In the Directory pane, open the system list folder that contains the system list you want to delete and select the list.
2. On the toolbar, click the arrow next to Edit List. Select Remove from the menu that appears. You can also

right click the list and select Delete List. A confirmation window appears. A confirmation window appears.

3. Click Delete to confirm that you want to delete this list. The list is deleted and removed from the system list folder.

Set Up Incremental Loading for Patient Lists

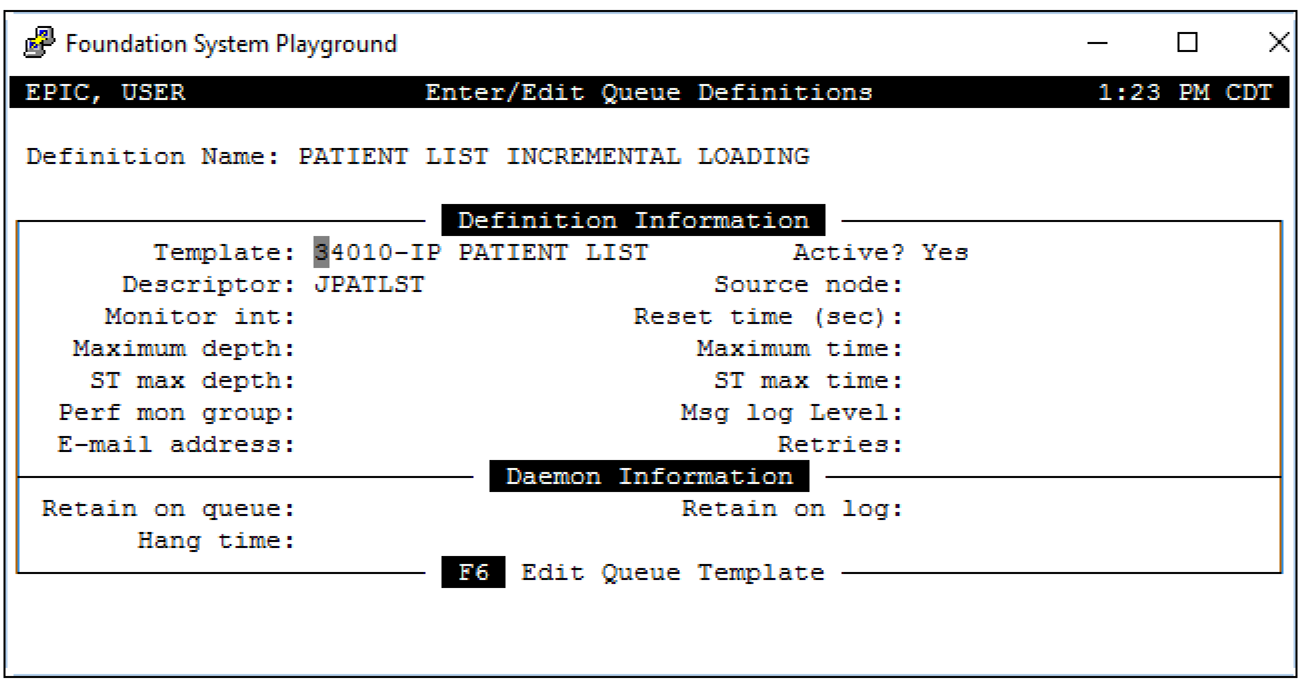
Incremental loading allows the system to load patient lists more efficiently. Instead of first loading all of the rows of a given patient list behind the scenes and then showing them all at the same time, incremental loading splits the job up into smaller chunks, or increments. This allows users to begin viewing a patient list before it is fully loaded, provides a more consistent response time for users, and improves patient list performance. All organizations should set up incremental loading for patient lists.

You must set up a queue definition that processes loading in the background. You also need to set a value in the patient list mnemonic that determines how long to wait before incremental loading occurs, if you want to change the default value.

Set Up the Queue Definition

To set up the queue:

1. In Clinical Administration, follow the path Management Options > Utilities > Generic Queuing System > Manage Queue Definitions > Enter/Edit Queue Definitions.
2. Create a new definition, called Patient List Incremental Loading.
3. In the Template (I E1R 350) field, enter 34010-IP Patient List.
4. In the Descriptor (I E1R 310) field, enter JPATLST, without an I. The descriptor must be correct for incremental loading to work.
5. Leave the Source node (I E1R 510) field blank because this queue needs to run on the production server. Running this queue on the shadow server isn't supported.
6. Go to the Start/Stop Information screen.
7. In the Machine List (I E1R 250) field, enter the production server on which the queue should run. The queue attempts to run on the servers in the order listed here.



To activate the queue:

1. From the Generic Queuing Menu, select Manage Queue Definitions > Activate/Deactivate Queue Definitions.
2. Enter the Patient List Incremental Loading definition you created above.
3. At the Are you sure you want to activate this queue definition? prompt, enter Yes.

To verify the queue is running:

1. From the Generic Queuing Menu, select Status of All Queues.
2. Verify that the JPATLST is running. If it's not running, press Shift+F7 to return to the Generic Queuing Menu.
3. Select Start a Queue and enter JPATLST at the Queue Descriptor prompt.

Configure the Mnemonic

Whether a patient list loads incrementally depends, in part, on the threshold value you configure in mnemonic 31075-IP_PATLST_MAX_ELAPSE (31075).

The Patient Lists activity attempts to load enough rows to fill the visible List pane as quickly as possible. For short lists, this can mean that the entire list attempts to load all at once. If enough rows load to fill the List pane before the threshold time is reached, then incremental loading begins at that point. If the List pane cannot be filled by the threshold value you configure, then incremental loading is activated at the threshold value and however many rows are available when the threshold value is hit are loaded into the List pane. Users can view patient information on the screen during incremental loading, but won't regain full control of the activity until enough patients have loaded to fill the List pane. We recommend setting a threshold value in the mnemonic that is most likely to load the List pane of most of your organization's patient lists on the first try, so that users regain control of the loading screen as quickly as possible. However, users are faced with an empty screen up to the time that incremental loading begins, so you need to decide how long you want users to wait on that blank screen before seeing something loaded.

In Clinical Administration, follow the path Management Options > Complete Configuration (HDF).

1. Open the compiled configuration record and go to the Customer Specific Install Mnemonics screen.
2. Add mnemonic 31075-IP_PATLST_MAX_ELAPSE to the first blank line in the Mnemonic (I HDF 2105) field.
3. In the corresponding Value (I HDF 2115) field, enter the number of seconds to use as the time threshold before incremental loading is triggered for patient lists. When no value is specified, a default value of 1.5 seconds is used. We recommend setting this field to 1 or 2 seconds. We don't recommend setting this field to more than 3 seconds.

Add Patients with Certain Orders to Lists Automatically

You can create a system list filter that adds a patient automatically to an appropriate system list when a clinician orders a certain inpatient procedure or medication for the patient. You can also create system list filters that find medications that are part of a medication grouper, therapeutic class, pharmaceutical class, pharmaceutical subclass, or delivered by a particular route. For more information about creating medication groupers, refer to the Build a General Grouper topic. Instead of having the system search through all of a patient's orders to determine if there are any patients who are taking warfarin, for example, you can set the system to check orders as they are created for warfarin orders. This type of filter also allows the system to check whether a patient needs to be removed from a system list when an order is canceled or a medication is discontinued or past its end date.

Create the Filter

Starting in May 2023:

1. In Hyperspace, open the Filters Editor for the Orders System Lists activity in one of the following ways:
   - From the Patient Lists activity, open the Edit List menu and select Manage Order List Filters.
   - Follow the path Epic button > Tools > Inpatient Tools > Patient List Management Utilities > Manage Order List Filters.
2. Do one of the following:
   - Create a new filter by clicking Create a Filter.
   - Select an existing filter from the list (I LSD 34804) and click Copy Filter to create a new filter.
   - Select a filter and click Edit to edit an existing filter.
3. Enter a name in the Filter (I LSD 34810) field.
4. Select the appropriate Medication and Procedure criteria from the Add menu, then enter the orders to filter on in the criteria's grid. For example, you could filter for all patients who currently have CBC orders by entering a list of all your organization's CBC orders in the Procedures grid.
5. For filters with procedure criteria, select the Include parent orders with no released child orders checkbox if you want to include those kinds of orders in the filter.
6. Click Save to save the filter.
7. If you use Content Management to move these filters to another environment, do the following to rebuild your orders system list. You do not need to complete these steps in the environment you created the filters in because the rebuild happens automatically in that environment.
   a. In Clinical Administration, Follow the path for your version
      - Starting in August 2024, go to Management Options > Utilities > Application Utilities> Orders > Rebuild Orders System Lists.
      - In May 2024 and earlier, go to Management Options > Utilities > Orders > Rebuild Orders System Lists.

   b. Enter Yes at the prompt to rebuild all orders system lists.

In February 2023 and earlier versions:

1. In Clinical Administration, follow the path Management Options > Edit System Definitions (LSD) > Patient List.
2. Go to the System List Filter Settings screen.
3. Enter a name for the filter value in the Filter Value column (I LSD 34804), keeping in mind your organization's naming conventions.
4. Press F6 to edit the filter value. The Edit System List Filters - Procedures screen appears.
5. Enter any criteria on which you want to filter for procedure orders.
6. On the Edit System List Filters - Medications screen, enter the criteria on which you want to filter for medication orders under the appropriate columns.
7. Press Shift+F7 to return to the System List Filter Settings screen. Verify that the Filter On column correctly indicates Procedures, Medications, or Both depending on what you configured in the filter.
8. In Clinical Administration, go to Management Options > Utilities > Application Utilities> Orders > Rebuild Orders System Lists. In May 2024 and earlier, go to Management Options > Utilities > Orders > Rebuild

Orders System Lists.

9. Enter Yes at the prompt to rebuild all orders system lists.

Add the Filter to a System List

1. In Hyperspace, go to the Patient Lists activity.
2. Create a new system list under the appropriate system list grouper.
3. In the Patient Source field on the General form, select Orders.
4. In the Medication and Procedure Filter section, select the filter you created above.
5. Select the Include pended patients check box to include pre-admitted or pended patients on the system list.
6. Configure the remaining System List Editor fields as appropriate.

Organize System Lists into Groups and Folders

In addition to the System Lists folder in the Directory pane, you can organize system lists in custom list folders. Custom list folders allow one level of organization more specific than the System List folder and are useful if your organization would like to categorize its system list types into groups.

You can also specify which custom list folders should be available for any given profile. For example, if your organization includes multiple hospitals, you can create a custom list folder for each hospital, store all hospital-specific lists in those custom list folders, and then make each folder available only in the profiles of the users at those hospitals. That way, users can more easily find the system lists they are looking for and are less likely to accidentally open the records of patients at other locations. When you don't specify custom list folders in a profile record, any custom list folders you have configured appear for users with that profile.

Custom folders also support additional list types that are not supported by standard lists, such as system lists specifically focused on recently discharged patients.

First, create custom list folders to organize your system lists. Then, you can create custom list groups. These groups, like system list types, determine what columns appear in system lists contained within the custom list group.

You can move a system list from one folder (a grouper) in the main System Lists folder to another grouper in that same folder by dragging and dropping in the Directory pane of the Patient Lists activity. You might find this particularly useful if you have more than one hospital and you want to use system list groupers to organize the system lists for each hospital.

In addition, the types of list movements listed below are possible, as long as the to and from folders are of the same type. For example, moving from a draw list grouper to a draw list grouper, or from a recently discharged grouper to a recently discharged grouper is allowed.

- Moving a system list from a grouper in the main System Lists folder to a custom folder.
- Moving a system list from one custom folder to another custom folder.
- Moving a system list from a custom folder to a grouper in the main System Lists folder.

Moving system lists from folder to folder is limited to users with one or both of the following security points in their user records:

- Inpatient security point 1-Patient List Administrator
- EpicCare security point 109-Patient Lists Administrator

Create a Custom List Folder and Give Users Access to It

1. In Clinical Administration, follow the path Patient Lists > Folders, Master Type (ERS). Enter a name for your custom list folder at the prompt and choose Yes to create a new folder.
2. Go to the Patient List Specification screen.
3. Enter Custom System List Folder in the Type (I ERS 50) field.
4. On the Patient List Folder Configuration screen, enter the name of your custom folder as it will appear in the Patient Lists activity in the Display Name (I ERS 34010) field.
5. If you would like to customize the icons used for your custom list folder, fill in the following fields. If you leave these fields blank, the system will use the default icons.
    - In the Folder Icon (I ERS 34230) field, enter the file name of an icon that will appear next to the custom list folder when the folder is not selected. This icon should be in the Inpatient Image Library.
    - In the Folder Selected Icon (I ERS 34231) field, enter the file name of an icon that will appear next to the custom list folder when the folder is selected. This icon should be in the Inpatient Image Library.
    - In the System List Icon (I ERS 34232) field, enter the file name of an icon that will appear next to a custom list in the folder when the list is not selected. This icon should be in the Inpatient Image Library.
    - In the System List Selected Icon (I ERS 34233) field, enter the file name of an icon that will appear next to a custom list in the folder when the list is selected. This icon should be in the Inpatient Image Library.
6. Leave the Default System List Group (I ERS 34240) field blank for now.
7. If you want to search for a specific type of patient, fill in the Patient Search Programming Point (I ERS

34200) and the System List Property Page (I ERS 34206) fields based on the table below.

   - In the Patient Search Programming Point field, enter the extension that determines which patients are added to a system list within the custom list folder. Note that any extension you use must be of the type 34530-IP Patient List Patient Search.
   - In the System List Property Page field, enter the category value of the file that is used to determine how custom system lists can be edited. Note that each System List Property category value should be used only with the extension that's listed in its row of the table.

8. In the Released field, enter Yes.
9. Press Shift+F7 to close the record.
10. In Clinical Administration, go to Management Options > Profiles (LPR) and open the profile to which you want to add a custom system list folder.
11. Open the Patient List menu and go to the Patient Lists and Folders screen.
12. In the Available custom system list folders (I LPR 34505) field, enter the custom system list folder(s) that you want to appear in the Available Lists section of the Directory pane for users with this profile. The behavior of this field depends on whether you include or exclude folders in the next step.
13. Review the Include or exclude custom folders (I LPR 34504) field and configure it as needed:
   - Enter Inclusive to include your specified custom system list folders in the Available Lists section of the Directory pane for users with this profile. If you don't specify any custom system list folders in the Available custom system list folder (I LPR 34505) field and you set this field to Inclusive, then no custom system list folders are made available to clinicians with this profile.
   - Enter Exclusive or leave this field blank to hide your specified custom system list folders from users with this profile. If you don't specify any custom system list folders in the Available custom system list folder (I LPR 34505) field, then all custom system list folders are visible to clinicians with this profile.

Patient Search Programming Point	**Which Patients Are Added to System List**	**System List Property Page ID (February 2021 and earlier)**	**System List Property Page category value (starting in May 2021)**	**Edit Syst Lists Bas On...**
Leave blank	Adds patients based on who's currently admitted to the hospital. This is the default system list.	IPSysListProperty	1 - System List	Location and bed occupanc status. This is th default system lis editor.
22490-	Adds	IPGenListProperty	2- General	General

Patient Search Programming Point	Which Patients Are Added to System List	System List Property Page ID (February 2021 and earlier)	System List Property Page category value (starting in May 2021)	Edit Syst Lists Bas On...
EpicLink Hospital Census Pt Search	patients who have an EpicCare Link provider as the admitting provider, attending provider, PCP, or part of the patient's treatment team. For use with EpicCare Link Patient Lists.		List	propertie of the system lis You can enter any property and value search or
26100-NT Patient List Generation	Adds patients who the triage nurse has recently triaged. For use with the Nurse Triage Patient List.	ECCDAdminTools{{CLIVER}}.CCTriageListPropPage	3 - Nurse Triage	Date, encounte type, use and departme for recen triaged patients.
28389-HH&H - Case Load Patient List	Adds patients whose home health or hospice care teams include the user.	IPGenListProperty	2 - General List	General propertie of the system lis You can enter a patient-context property and a valu to search on.
34130-IP Patient List	Adds patients who	IPRecDCProperty	4 - Recently Discharged	Location, how long

Patient Search Programming Point	Which Patients Are Added to System List	System List Property Page ID (February 2021 and earlier)	System List Property Page category value (starting in May 2021)	Edit Syst Lists Bas On...
Recently D/C Patients	have been recently discharged.		Patients	ago patie were discharge and whet to include admissior HOV, or both in th search.
34131-IP Patient List HOV Patients	Adds patients who are in Hospital Outpatient Departments.	IPHOVListProperty	5 - HOV Patients	Location and patie admissior status.
34133-IP ED Arrived Patients	Adds patients who have arrived in the emergency department within a specified number of days.	IPRecDCProperty	4 - Recently Discharged Patients	Location, how long ago patie were discharge and whet to include admissior HOV, or both in th search.
34141-IP Patient Lists Expected Patients (Pre-Admissions)	Adds patients who are pre-admitted to the hospital.	IPHOVListProperty	5 - HOV Patients	Location and patie admissior status.
38343-HIM Def Chart Deficiencies	Adds patients with chart deficiencies.	Leave blank	Leave blank	Date, encounte type, user and departme for recen triaged

Patient Search Programming Point	Which Patients Are Added to System List	System List Property Page ID (February 2021 and earlier)	System List Property Page category value (starting in May 2021)	Edit Syst Lists Bas On...
				patients.
51855-Patient Lists: ORD System List Generator	Adds patients with expected lab draws.	ELabWLSupport{{CLIVER}}.LabPtListProp	6 - Lab Draw List	Lists of la draws anc filters.
56010-PP Patient List Generation	Adds obstetrics patients with pending deliveries.	EOBPendingPregnancies{{CLIVER}}.OBSelect	7 - Pending Deliveries	Providers gestation age, and estimatec delivery date.
Leave Blank	Adds patients from the system lists that make up the combined list.	Leave blank	8 - Combination List (available starting in May 2022)	N/A- Combines previousl existing system lis

Create a Custom List Group

1. In Hyperspace, open the Patient Lists activity.
2. Select the custom list folder in which you want to make your custom list group.
3. On the Activity toolbar, click the arrow next to Edit List. Select Create System List Grouper from the menu that appears. You can also right click the custom list folder in the Directory pane and then select Create System List Grouper from the menu that appears. The My List Editor appears.
4. In the Name field, enter an appropriate name for the custom list group, keeping in mind your organization's naming conventions.
5. In the Owner field, your user name is automatically added. You can change this by clicking the Selection button for a list of options.
6. Add a column to your list type by selecting a column from the Available Columns table and clicking Add. The column disappears from the Available Columns table and appears on the Selected Columns table.
7. Rearrange columns on the Selected Columns table by selecting the column you want to move and clicking the up or down arrow buttons.
8. To copy the layout of an existing patient list instead of rebuilding the layout from scratch, you can:
   a. Click Copy. The Choose columns window appears.

b. Select a My List template or another patient list. The columns and layout of the selected template or list appear in the Selected Columns table.

9. Click Accept. A folder with the custom list group appears within the custom list folder in the Directory pane.

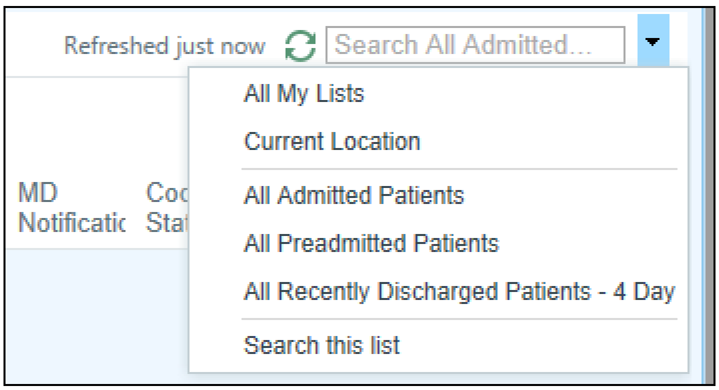
Specify a Default Custom List Group for a Custom Folder

You can help ensure that system lists in a custom list folder have a standard layout, even if those system lists are not associated with a specific custom list group, by assigning a default custom list group to a custom list folder.

1. In Clinical Administration, follow the path Patient Lists > Folders, Master Type (ERS).
2. At the Patient List prompt, enter the name or ID of your custom list folder.
3. Go to the Patient List Folder Configuration screen. In the Default System List Group field, enter the custom list group to which custom system lists in this custom folder should be automatically assigned. If a list in this folder is not assigned to a custom group, it is automatically assigned to the group listed here.

Configure the Patient List Search

When a clinician knows the name of a patient but does not know which My List or system list the patient is on, she can use the Patient Lists search.



To make it easier to find patients, we recommend:

- Configuring the default search scope to include all admitted patients.
- Giving providers the option to search recently discharged and pre-admitted patients. By default, providers can select Search this list, which searches the currently selected patient list, or Current Location, which searches the user's login location.

After a clinician starts using the search field, the system remembers the search scope she used last and uses that as the new default search the next time that clinician opens the Patient Lists activity.

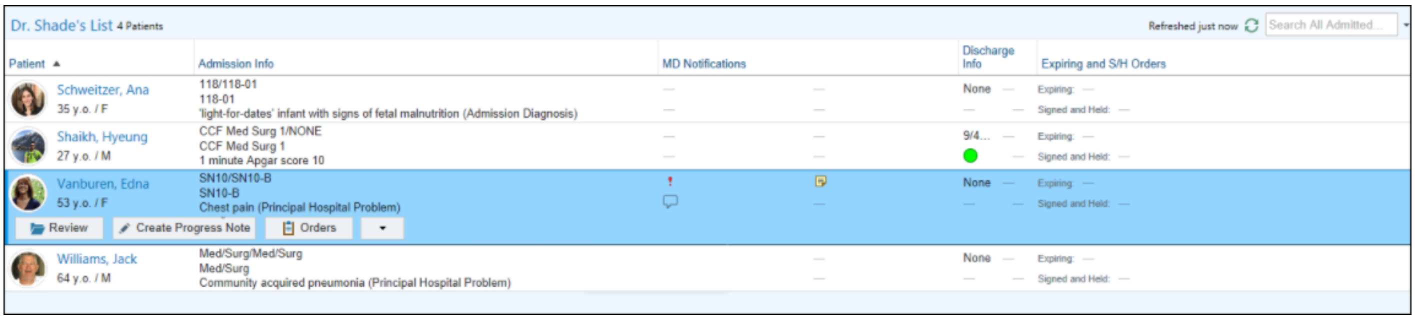
If clinicians at your organization regularly use more specialized system lists, you can include those system lists among their search options. A phlebotomist, for example, might find it helpful to be able to search a draw list by using the Patient Search menu rather than opening the draw list and then searching it.

1. In Clinical Administration, follow the path Management Options > Profiles (LPR) and open the profile to which you want to add search options.
2. Go to the Patient List Search Settings screen.
3. In the Default search (I LPR 34545) field, enter the default scope for the search. If left blank, the scope is Current Location. To follow Epic's recommendation to search all admitted patients by default, select First list defined in the profile. You'll define the list in the next step. The other options are:

    - Currently selected list
    - Current Location
4. In the Available lists to search (I LPR 34535) field, enter the system lists you want to appear as search options in the Patient Search menu. Users have the option to search these lists in addition to the Epic-released search scopes. To follow Epic's recommendation to search all admitted patients by default, the first list in this field must be a patient list that includes all admitted patients. We also recommend including lists with recently discharged patients and pre-admitted patients.

Configure the Patient List Tray

The patient list tray is a menu of shortcuts to activities for a given patient. Building patient list trays for your inpatient clinicians means they can access their most important activities directly from Patient Lists, rather than first opening Patient Summary or Chart Review and navigating from there.



The patient list tray appears when a clinician selects a patient's row in Patient Lists. These shortcuts lead to activities in a patient's chart that a clinician would want to access first when opening a chart.

> If any of the following are true, clinicians are not be able to see the patient list tray regardless of whether you have configured a patient list tray for them:
>
> - Your organization has suppressed rich features in a system list or grouper as described in the Suppress Rich Features in System Lists topic.
> - Your organization or a user has no patient photo, column block, or hover bubble columns in a list or My List. In addition, patient lists with a hover bubble column and no other rich features might not show the patient list tray depending on if there's data to show in the hover bubble column. Patient lists can show the patient list tray regardless of whether they have any of these columns added. Grids configured this way appear with taller rows and no Wrap Text button because they need to support rich features. For more information on how grids with rich features appear to clinicians, refer to the Patient Lists switches between two different list views topic.

Determine Which Activities to Add to a Patient List Tray

Keep in mind the following guidelines when adding activities to your patient list tray:

- Provide shortcuts for only the activities users frequently need and would want to use when first opening a patient's chart.
- Although you can add up to ten activities to a patient list tray, try to include no more than five. While the

first five shortcuts will have individual icons and buttons in the tray, the sixth shortcut onward will appear in a single menu that won't be visible unless a clinician clicks an additional button.

- When arranging activities, enter a clinician's most used activities first and list similar activities next to each other if possible. If there is no other logical way to organize activities, organize them alphabetically.
- Users can also access popup activities, such as flowsheet popups, through the patient list tray. Consider adding popup activities to the patient list tray if your clinicians frequently use them.

You can find activities that users with a given profile would want in their tray in the Toolset section of their Workflow Engine Results report. To find these activities:

1. Log in to Hyperspace as a user with the profile you want to build the tray for and open the chart for an admitted patient.
2. Go to Epic button > Help > Session Information Report > Patient Encounter Workspaces and click the link next to the Workflow Engine Rule Explanation for the open patient chart.
3. In the Workflow Engine Results window, write down the IDs for the user's current activity menus under the Activity Tabs and More Activities sections of the Toolset report.
4. In Chronicles, go to the Menus (E2U) master file > Enter Data > View Menu and open the menus using the IDs you wrote down. The Menu Information screen includes IDs for the activities accessible through a given menu. Write down these IDs for when you build your patient list tray.

Data-Driven Trays: If your organization uses the Inpatient Provider Efficiency Profile (PEP) and Nursing Efficiency Assessment Tool (NEAT), you can look at PEP/NEAT data to find which activities your clinicians spend the most time in. For more information: refer to the PEP/NEAT Content topic.

Activity items that don't require a contact, such as Chart Review (UCW_CHART_REVIEW) and results review (UCW_RESULTS_REVIEW), open a non-encounter chart for the patient when opened from the patient list tray. We don't recommend adding these types of activities to patient list tray because clinicians might be confused when they open these activities during an encounter and see non-encounter activities in their activity tabs.

Note also that due to their toolbar-specific behavior, the following items should not be added to a patient list tray:

- CreateMyList: "IP_IT_PAT_MY"
- CreateRemList: "IP_IT_PAT_REMIND"
- CreateSystemList: "IP_IT_PAT_SYS"
- CreateSystemListFolder: "IP_IT_PAT_SYS_TYP"
- CreateTemplate: "IP_IT_PAT_TMPLT"
- CreateGrouper: "IP_IT_PAT_PAF_GROUPER"
- ManageMyLists: "IP_IT_PAT_MANAGE_MYLISTS"
- Properties: "IP_IT_PAT_PROP"
- Remove: "IP_IT_PAT_REMOVE"
- RemoveList: "IP_IT_PAT_REMOVE_LIST"
- AddPatient: "IP_IT_PAT_ADD"

- Copy: "IP_IT_PAT_COPY"
- Paste: "IP_IT_PAT_PASTE"
- TreatmentTeam: "IP_IT_TRTTEAM"
- AssignMe: "IP_IT_TT_ASSIGNME"
- EndMyAssignments: "IP_IT_TT_UNASGNME"
- AssignOthers: "IP_IT_TT_ASGNOTHER"
- EndOthersAssignment: "IP_IT_TT_ENDOTHER"
- OurPractice AdvisoryRefresh: "IP_IT_PAT_OurPractice Advisory_REFRESH"
- QuickAdmit: "IP_IT_QUICK_ADMIT"
- QuickDischarge: "IP_IT_QUICK_DISCHARGE"
- AssignTeams: "IP_IT_ASSIGN_TEAMS"
- RemoveTeams: "IP_IT_REMOVE_TEAMS"
- *SignIn: "IP_IT_SIGN_IN_TEAM_MEMBER"
- PatientReport: "IP_IT_PAT_REPORT"
- PrintList: "IP_IT_PRINT_PATLIST"
- WriteHandoff: "IP_IT_PAT_WRITE_HANDOFF"
- PrintHandoff: "IP_IT_PAT_PRINT_HANDOFF"
- TreatmentTeamSubMenu: "IP_MNU_TRTTEAM"
- AssignmentWizard: "IP_IT_ASSIGNMENT_WIZARD"

Build a Patient List Tray Menu and Attach It to a Profile

To give clinicians access to activity shortcuts through a patient list tray:

1. In Chronicles, open the Menu (E2U) master file and create a new menu record for your patient list tray. Take note of this menu's record number for later. For more information about building and configuring menus, refer to the Activities and Menus: Strategy and Setup topic.
2. On the General Information screen:
   - In the Menu type parameter, enter a value of Menu.
   - In the Available to Applications field, enter a value of DESKTOP.
3. On the Menu Information screen, enter the record name for up to ten activities you want your clinicians to be able to access from the patient list tray.
4. Use the Build Wizard in Hyperspace to connect the patient list tray to the profile of your choice. In addition to clinical users, we also recommend making the feature available for administrators to help with troubleshooting. To get started, open the Build Wizard (search: Build Wizard) and search for feature 340019-Add Patient List Trays to Profiles (application: Inpatient EMR).
   - If you need to adjust these settings after running the Build Wizard, in Clinical Administration go to Management Options > Profiles and open the profile that will use the patient list tray. Enter the record ID you noted from step 1 in the Patient List Tray (I LPR 34470) field.

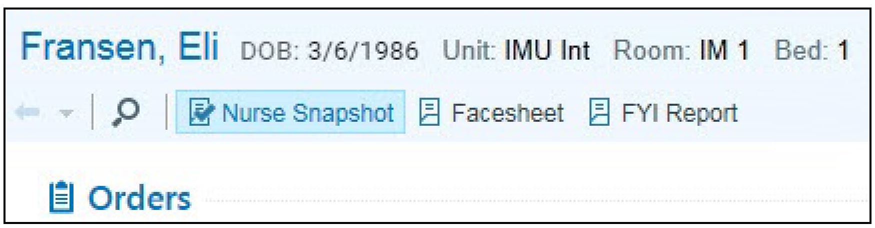
5. Confirm that the patient list tray shows all buttons and icons as expected.

> If any of the buttons in the patient list tray have a broken image icon , the corresponding activity item in the patient list tray's Menu (E2U) record might be using a version of the icon that is incompatible with the web-migrated Patient Lists activity. To find a suitable icon for the patient list tray, check Icon Town to find a similar icon with a Platform of HSWeb. Then, to add the compatible icon to a patient list tray's Menu (E2U) record, refer to the Use Icons in Custom Menu Records topic.

Configure Patient List Reports

Patient List reports make it easier to find information without changing activities. You can configure which report appears by default, what other reports a clinician has access to, and what patient information appears in the Report pane header.

Because Patient List reports take up only part of the screen, trying to include too much information in a single report can make them hard to use. We recommend separating Patient List reports based on the kind of information in the report. Then, providers can use the toolbar to select the report they need and avoid too much scrolling within a report.



For your initial go-live, we recommend limiting the number of reports you include and making sure clinicians know how to find and use them. After clinicians become more comfortable with the system, you can add more reports.

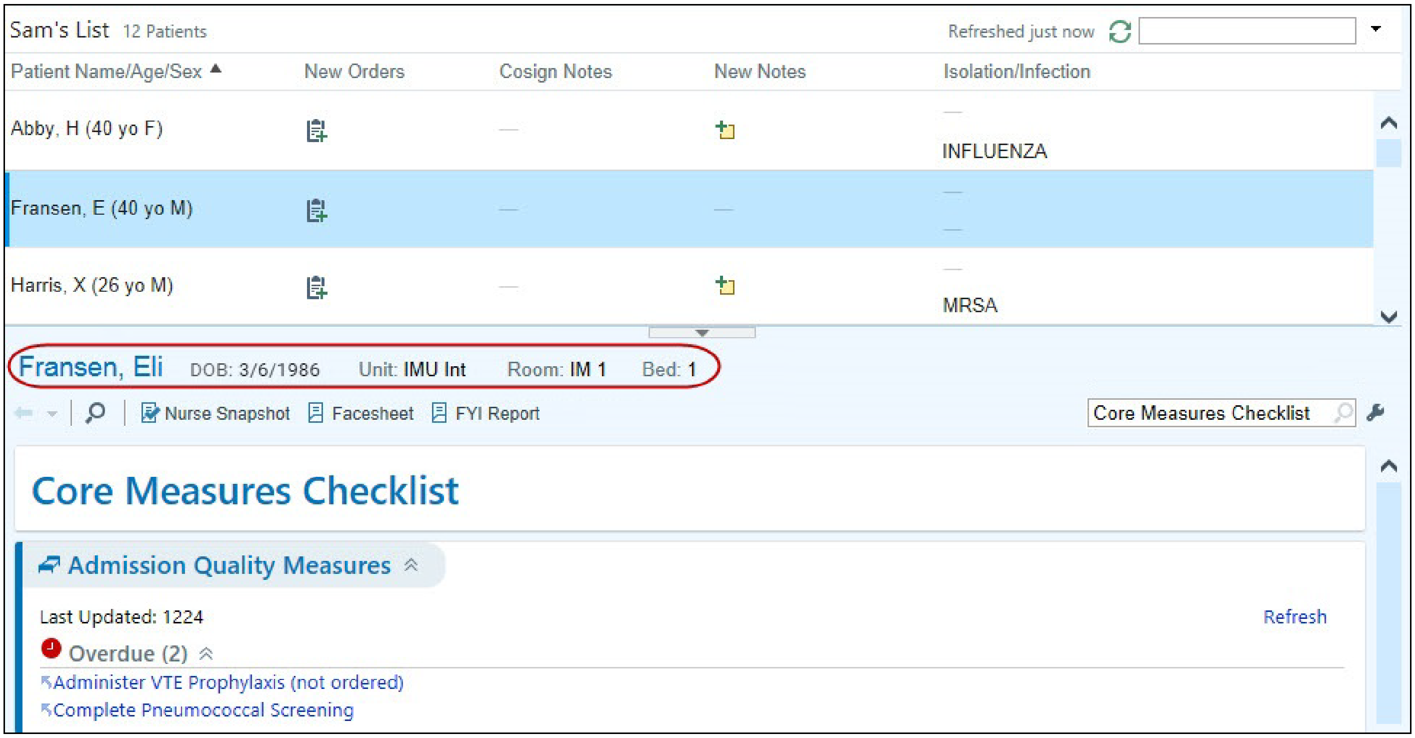
Starting in August 2025, clinicians can see reports in the Brain. The report configuration you do for Patient Lists also applies to the Brain, unless you disable the report pane in the Brain. Refer to the Hide the Report Pane in the Brain topic for more information about disabling the report pane in the Brain.

Determine What Appears in the Report Pane Header

The Report pane shows patient list reports for the patient selected in the List pane. If a user selects a patient and then scrolls down the List pane, the selected patient's name might not be visible. To make it clear which patient's information appears in the Report pane, the following basic patient information appears in the Report pane header:

- Date of birth (starting in November 2022 and May 2022 with special update E10201583).
- Name
- Unit
- Room
- Bed

Starting in November 2022 and May 2022 with special update E10201583, if a patient isn't admitted, then only their name and birth date appear in the Report pane header.



For users who always work in the same unit, it might be unnecessary to include the patient's unit in the header. You can specify whether the patient's unit information should appear in the header in a user's profile record:

1. In Clinical Administration, follow the path Management Options > Profiles (LPR) and open the profile you want to configure.
2. Go to Patient List > Patient List Reports screen.
3. In the Hide patient's unit in header (I LPR 34065) field, enter Yes to hide the patient's unit in the Report pane header.

Control Which Reports Clinicians See Automatically

Clinicians with a default report in the Patient Lists activity see that report in the report pane each time they open the Patient Lists activity and select a patient. You can set a default report for the Patient Lists activity at the profile level or the facility level. Epic recommends selecting a simple default report, such as a report that shows only basic patient demographics or details, to ensure that the report loads quickly.

1. In Clinical Administration, follow the path Management Options > Profiles (LPR) > Patient List. If you plan to set the default report at the facility level, go to Edit System Definitions (LSD) instead of Profiles (LPR).
2. On the Patient List Reports screen, enter a report in the Default report for display field (I LPR 34030).

Give Clinicians Access to Additional Patient List Reports

Clinicians often need to review details from different reports, such as specialty-specific reports, in the Patient List activity. Specify which reports are available based on a clinician's profile. Further, you can determine which of those reports have corresponding buttons on the report toolbar for easier access.

Specify Available Reports

1. In Clinical Administration, access a profile and select Patient List.
2. On the Patient List Reports screen, enter report IDs in the Available Patient List Reports column (I LPR 34023).

Give Clinicians Report Toolbar Buttons for Certain Reports

1. In Clinical Administration, access a profile and select Patient List.
2. On the Patient List Reports screen, enter report IDs in the Startup Patient List Reports column (I LPR 34024). You can enter only reports that are also listed in the Available Patient List reports column (I LPR 34023).

Lock Alert-Based Print Groups Appearing in Patient List Reports

While in the Patient Lists, Summary, and Summary Sidebar activities, clinicians can use drag-and-drop functionality to rearrange print groups in a given report. This helps them review information according to their individual workflows and preferences, but it's important that alert-based print groups don't get lost in the shuffle. To keep these important print groups visible, we've locked any print groups that are both alert-based and currently located at the top of a report. Any alert-based print groups currently listed below non-alert groups are not locked automatically and might need to be locked to ensure that clinicians don't move them to a location where they could go unseen.

For more information on locking potential alert-based print groups, refer to the Lock Alert-Based Print Groups topic.

Let Users Link to Restricted Patient Information from Patient Lists

Clinicians can access restricted patients' charts from report 45344-IP BTG Patient List Report in the Patient Lists activity. A link to the Break-the-Glass window appears in the Report pane when a clinician selects a restricted patient in Patient Lists.

Report 45344 appears by default for restricted patients if you do not have a Break-the-Glass report specified in EMR System Definitions. However, we recommend performing setup to verify that other build doesn't prevent the report from appearing.

1. In Clinical Administration, go to Management Options > Edit System Definitions > Patient List.
2. Access the Patient List Reports screen.
3. Under Default Reports, enter report 45344 next to Break the Glass

Send Patients, Friends, and Family Updates About an Admission or Appointment

Starting in February 2021

When an admitted patient's family and friends can't visit, they can feel anxious and out of the loop as they wait for updates. You can help the patient's companions plan their time and have some peace of mind by sending them notifications about the patient's progress through text message or email. This feature also saves clinicians time because they don't need to pause in their care of the patient to find and communicate with those who want to receive updates.

This feature can also be used with Patient Lists in an outpatient context. For ambulatory departments, patient messaging is useful in keeping patients and their contacts up-to-date about the progress of the appointment, or letting them know that you're ready to see them if they're waiting somewhere other than your waiting area.

To send updates about an admitted patient's progress, you must have the Visit notifications to family/friends license, which is included in the standard EpicCare Inpatient, OpTime, and ASAP licenses. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

When you implement this feature, clinicians and staff can access two new activities from the Patient Lists toolbar:

- The Visit Contacts activity, where clinicians can add contacts who should be available as message recipients. The activity suggests contacts listed in the patient's demographics and MyChart proxies, and clinicians can also add new contacts.
- The Visit Messaging activity, where clinicians can write a free-text message or select a SmartText to send to the patient or their contacts.

Users can access the Visit Contacts activity by clicking a link in the Visit Messaging activity. To save space, you might choose to make only the Visit Messaging activity button available in the Patient Lists toolbar and have users access the Visit Contacts activity from there.

Prerequisites

Before you can send messages, you need to verify that you have the following prerequisites set up. It's likely you already have these in place, but it's important to check because patient messaging won't work without them.

- Your service area must be set up to send email and text messages, as described in the Set Up Your Service Area to Send Email and Text Messages topic.
- Your system must be set up to send text messages for SMS notifications.
  - Starting in February 2023, if you are licensed for Hello World's SMS gateway, which is license key C of the Hello World license, you need to have your sender profile setup, as described in the SMS Gateway Pre-work topic. For more information about Hello World licensing, contact your Epic representative and mention parent SLG 3550868.
  - In November 2022 and earlier versions, or if you don't use Hello World's SMS gateway, you need a third-party communication vendor to send text messages, as described in the Set Up Outgoing Text Messages topic.

Set Up Your Service Area to Send Email and Text Messages

Verify that your service area is set up for email and text messages to be sent. These settings are shared with Cadence appointment updates, so it's likely you've already completed this setup, but it's important to check because sending messages won't work without it.

1. In Cadence Text, follow the path Cadence Management Menu > Service Area, open your service area, and go to the Patient Appointment Updates and Quick Reminders screen.
2. In the Delivery Types Allowed (I EAF 15302) field, make sure there's a value of either 1-E-mails Only or 2-Both Text Messages and E-mails.
3. In the E-mail Source Address (I EAF 15305) field, make sure that there's an email address to send emails to recipients.
4. When recipients sign up to receive messages, a sign-up confirmation message is sent to them. The default message is "You are signed up to receive patient update messages." In November 2022 and earlier, the default message is "You are signed up to receive patient update messages. Please do not reply to these messages." To customize the confirmation email message, in the Sign-up Confirmation Msg (I EAF 15310) field, enter a SmartText message with a Context (I ETX 30) of 931-Patient External Notification. How you customize the confirmation text message depends on whether you use Hello World's content management

framework:

  - If you use Hello World, you can customize the content in your override communication template for base communication template 15310-Visit Messaging Sign-Up Confirmation - SMS - Broadcast (in August 2024 and earlier, named Visit Messaging Sign-Up Confirmation), as described in the Create Override Communication Templates topic. Then work with your Hello World team to approve your communication template, as described in the Approve Message Content topic.
  - If you don't use Hello World, the SmartText you specified in the Sign-up Confirmation Msg field is used for both the email and text sign-up confirmation message.

Create Email and Text Messages to Send

You can create email and text messages to send ad hoc. How you set up messages depends on whether you're licensed for Hello World's SMS Gateway and whether you're setting up text or email messages.

Follow these steps if you use Hello World for text messages. Note that you need to use SmartTexts for email messages.

1. Review the released communication templates with your organization's legal and compliance teams to determine whether you can use the sample content as is. Refer to the Manage Message Content topic for information about creating or customizing your override communication templates. Keep the following in mind as you build text messages:
   - Use communication workflow 83002-Visit Messaging.
   - Messages must support a SmartTool Context (I HST 85540) of 931-Patient External Notification.
   - Starting in November 2024, don't enter anything in the Experience Type (I HST 85541) or Channel (I HST 85542) fields on the communication topic.
2. Then work with your Hello World team to approve your communication templates. If you make any changes to message content while reviewing and enabling communication templates, you need to also update the translated notification content for those messages. If you don't update the translated notifications, the messages are sent only in English.

In August 2023 and earlier versions, for other types of messages, or if you aren't licensed for Hello World's SMS Gateway, you need to create SmartTexts for text and email messages. You can use Foundation System SmartText 19821-UC Patient Message - Call Patient to Front Desk as an example while you build your own. Log in to the Foundation Hosted environment as your organization's inpatient administrator (IPADM) and open SmartText 19821 (search: SmartText). You need Shared security point 365-Edit External Notification SmartTexts and SmartLinks to create this type of SmartText record. Keep the following in mind as you build SmartText messages:

- Make sure your SmartText has a type of 931-Patient External Notification. If you intend to send the message as a text, use 160 characters or fewer. Refer to the Create and Edit a SmartText topic for more information on building a SmartText.
- If your SmartText includes any SmartLinks, make sure that the information they pull into the SmartText is appropriate to send to patients and contacts. Then, list the SmartText's context as an allowed context in each SmartLink. For information on allowing a context, refer to the Make a SmartLink Available in Certain Contexts section of the Edit a SmartLink topic.

Next, make the messaging activities and messages you created available to users, as described in the Make Messaging Available to Users topic.

Make Messaging Available to Users

To make messaging available to users, you need to give users security, add the messaging buttons to your Patient Lists toolbars and enable the appropriate profiles to send messages.

Give Users Security to the Messaging Activities

Give users security to access the Visit Contacts activity, so they can add, remove, and update recipient contact information. Also give users security to the Visit Messaging activity, so they can send messages and view message history. For information about adding security points, refer to the Edit an Existing Security Class topic.

- Starting in November 2025, Shared security point 356-Send Patient Notifications lets staff use the Visit Messaging activity. EpicCare security point 605-Update Visit Contacts lets staff access the Visit Contacts activity through links in Visit Messaging. We recommend that all users who use Visit Messaging have both security points.
- In August 2025 and earlier, EpicCare security point 605-Update Visit Contacts lets staff use the Visit Messaging activity and access the Visit Contacts activity through links in Visit Messaging. We recommend that all users who use Visit Messaging have this security point.
- Grand Central security point 80-May Access ADT Visit Contacts Activity allows users to access the Visit Contacts activity directly. We recommend you give this security point to users who have access to Visit Contacts through toolbar buttons and explain below how to add the messaging activities to toolbars.

Add the Messaging Buttons to Toolbars

Next, make the messaging activities available for users to open by adding the Visit Messaging and Visit Contacts buttons to your Patient Lists toolbar:

1. In Hyperspace, open a user role in the Role Editor (search: Role Editor).
2. In a new line in the Menu To Extend (I E2R 40) field, enter your Patient Lists toolbar.
3. In the Menu Descriptor (I E2R 45) field, enter the menu record for the Visit Messaging activity. You might also want to enter the menu record for the Visit Contacts activity.
    a. Starting in November 2025, if your user has EpicCare security point 605-Update Visit Contacts and Shared security point 356-Send Patient Notifications, they can already open Visit Contacts through links in Visit Messaging and don’t need the button to open Visit Contacts directly. Not adding the Visit Contacts button can save toolbar space for those users. For users that don’t have both EpicCare security point 605 and Shared security point 356-Send Patient Notifications, give them both buttons so they can open both activities.
    b. In August 2025 and earlier, if your user has EpicCare security point 605-Update Visit Contacts, they can already open Visit Contacts through links in Visit Messaging and don’t need the button to open Visit Contacts directly. Not adding the Visit Contacts button can save toolbar space for those users. For users that don’t have EpicCare security point 605, give them both buttons so they can open both activities.
        - For Visit Messaging, menu 77025-IT_VISIT_MESSAGING_POPUP
        - For Visit Contacts, menu 34481-IP_IT_VISIT_CONTACTS_POPUP

Enable Profiles to Send Messages

Next, set up the profiles that you want to enable for sending ad hoc messages. Users can send ad hoc messages in two ways: they can send custom messages they create, or they can send pre-configured messages that you created. You also need to specify whether both email and text delivery methods are allowed.

To let users send custom messages:

1. In Clinical Administration, follow the path Users, Providers > Profiles (LPR) and open the profile you want to configure.
2. Follow the path Specialties, Other Modules > Procedural Areas and go to the Visit Messaging Settings - 1 screen
3. Enter one of the following options in the Allow free-text messages (I LPR 67520) field.
   - Enter No to prevent users from writing custom messages or editing pre-configured messages. If you select No, be sure to build pre-configured messages and list them in the profile, or users won't be able to send messages. If this field is blank, custom messages are not allowed.
   - Enter Yes to allow users to write custom messages and edit pre-configured messages.

If you created pre-configured messages, make them available for users to send:

1. In Text, go to the Visit Messaging Settings - 1 screen in the profile record you are configuring.
2. In the Display Name (I LPR 67522) column, enter the display name for the pre-configured message.
3. Enter the pre-configured message you created in one of the following places:
   - Starting in November 2024, enter your communication topic in the Communication Topic (I LPR 67531) column.
   - Starting in February 2023 and before November 2024, enter your base communication template in the Communication Template (I LPR 67529) column.
   - For SmartText notifications, enter your SmartText in the SmartText (I LPR 67521) column.

Then, list which delivery methods are allowed in the profile. There are two delivery methods: email and text. You can allow both methods or only one method. To adjust the delivery method options:

1. In Text, go to the Visit Messaging Settings -1 screen in the profile record you want to change.
2. In the Allowed message delivery methods (I LPR 67530) field, enter Email or Text. To enable both methods, enter the other method in a new line.

Send Messages to a Loaner Device Using Generic Contact Information

You can configure generic contact information to appear in the Visit Contacts activity. Using generic contact information allows you to send text or email messages to a specific device, such as a phone or pager that could be loaned to a patient's family member that does not have one.

To add generic contacts:

1. In Clinical Administration, follow the path Users, Providers > Profiles (LPR) and open the profile you want to configure.
2. Follow the path Specialties, Other Modules > Procedural Areas and go to the Visit Messaging Settings - 2 screen.
3. In the Show generic visit contacts? (I LPR 67524) field, enter one of the following:
   - Always. Generic contacts always appear in the list of suggested contacts.
   - Yes, if no pre-existing visit contacts. Generic contacts appear only if there are no other contacts for a patient in the Visit Contact activity.
   - No. Generic contacts never appear in the list of suggested contacts.
4. In the Contact Name (I LPR 67525) field, enter the name of the generic contact.
5. Optionally, you can specify a relationship in the Relation (I LPR 67526) field. This option pulls from the

Emergency Notification Relation (I EPT 770) category list and appears in the Relationship field in the Visit Contacts activity. This field will typically not be needed but can be used to show additional information about the generic contact, such as the type of the device.

6. In the Phone (I LPR 67527) field, enter the phone number of the generic contact.
7. In the E-mail (I LPR 67528) field, enter the e-mail address of the generic contact.

You must enter either a phone number or e-mail address to send a message to the generic contact.

Copy Report Columns for Customization

Columns are used to show information about patients in the Patient List activity. This information can range from basics, such as the patient's age and sex, to more specialized information, such as whether the patient's required documentation has been completed on time. Clinicians can quickly see relevant information about a patient in these columns.

You can make copies of the report columns that come with your system and customize them to suit the needs of your organization. Refer to the Search for Existing Report Columns topic for information on how to search for report columns that meet your needs.

1. In Hyperspace, open the Column Editor (search: Column Editor).
2. Select Create new column. Enter a column name and ID number, keeping in mind your organization's naming conventions.
3. In the Copy from field, select the column you want to copy from.
4. Click Accept. The Column Editor opens.
5. Customize your column as necessary. Refer to the following topics for more information about configuration options:
    - Modify an Existing Report Column
    - Create a Report Column from Scratch
6. Click Accept when you are finished.

To let clinicians use the columns you create in their My Lists, add the columns to the appropriate user profile. Refer to the Give Clinicians Access to Columns in Patient Lists topic for more information.

Give Clinicians Access to Columns in Patient Lists

Users' access to columns depends on their profile settings. When you create a new column or column grouper, add it to the profile of users who need it so they can find it in Hyperspace. If no columns or column groupers are listed in a user's profile, the user has access to all columns and column groupers in the system. If a profile has any columns or column groupers listed, then those are the only columns and column groupers users with that profile see in Hyperspace.

1. In Clinical Administration, follow the path Management Options > Profiles (LPR) and open a profile.
2. Select Patient List and go to the Patient List Columns screen.
3. Enter columns or column groupers in the appropriate field. Users affected by the profile have access to all columns and column groups you enter in these fields:
    - To make specific columns available, enter one or more columns in the Available columns (I LPR 34500) field.
    - To make column groupers available, enter one or more column groupers in the Available column

groupers (I LPR 34525) field.

Organize Report Columns into Groups

You can maintain the report columns available to different groups of clinicians without manually updating each profile associated with them. By organizing columns into new column groupers and attaching those groupers to profiles, you can update multiple profiles at once by adding and removing report columns from the grouper record. If clinicians in your organization have different profiles but need access to the same report columns, using column groupers can potentially save you time and effort.

> If you want to import multiple column groupers rather than manually creating each one, you can use an import specification to bring in this data. For example, this import is useful when you first implement column groupers because you'll have a lot of column groupers to create at one time. Use import specification ERS,1070-PAF Column Grouper to import column groupers into the Patient Lists (ERS) master file. For more information about importing records, refer to the Standard Import Guide.

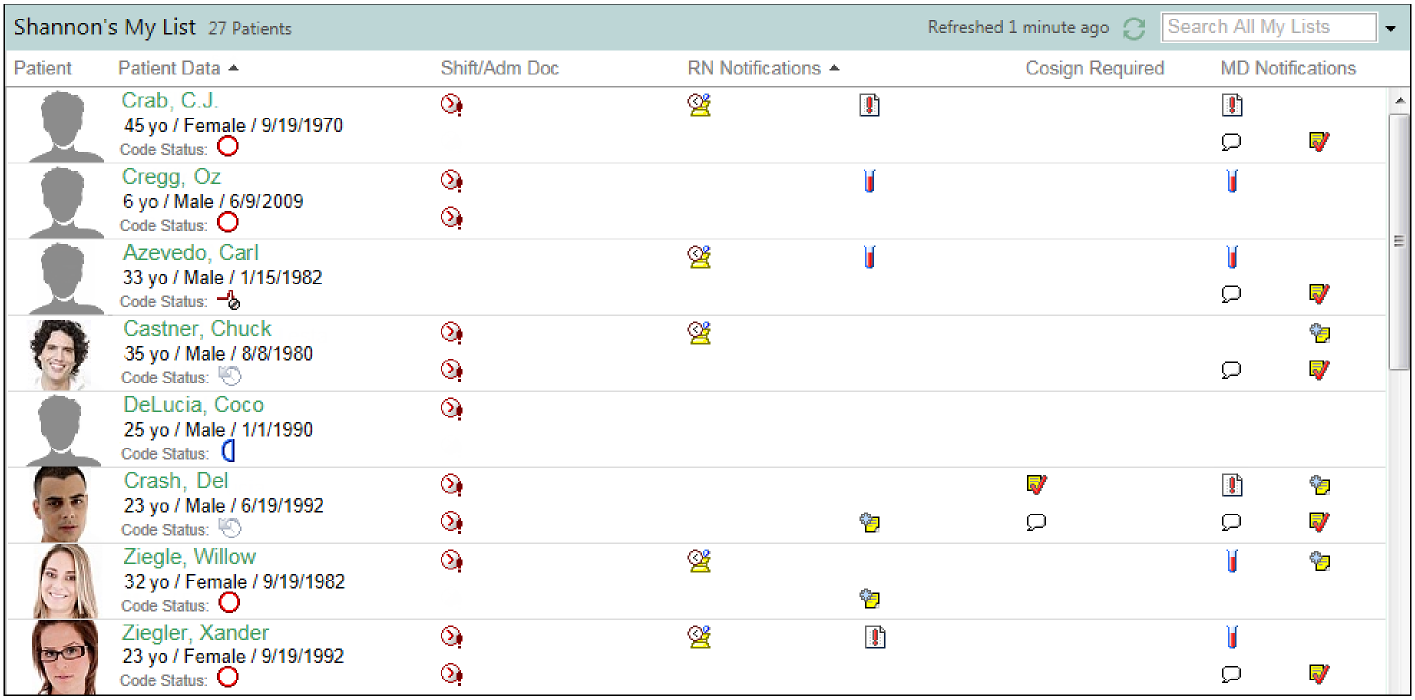
1. In Hyperspace, go to the Patient lists activity.
2. On the toolbar, click the arrow next to Edit List. Select Manage Column Grouper from the menu that appears. The Column Grouper Record Select window appears.
3. Create a new column grouper, keeping in mind your organization's naming conventions. The Column Grouper Properties window appears.
4. From the Available Columns list, select the columns you want to include in the column grouper and click Add. The columns appear in the Selected Columns list.
5. Click Accept.

Add the column groupers you create to the appropriate user profile. For more information, refer to the Give Clinicians Access to Columns in Patient Lists topic.

Use Column Blocks to Better Organize Your Patient Lists

Column blocks are a different type of patient list column that show information from multiple patient list columns at once. For example, you might choose to combine the Patient Name, Age/Sex/DOB, and Unit columns into one column block so that all of that information is still available and visible, but valuable space is opened up on the screen to show other information. Column blocks can be used alongside columns in the Patient Lists activity, and users can add them to their My Lists directly from the List Editor. If you want to make sure one piece of data within a column block gets more attention, you can apply accenting to it, which increases the font size and changes the font color to match the user's Hyperspace theme. Epic has created many column blocks that can be used as released. Refer to the Column Block Catalog for a complete list.

> Column blocks are split into their constituent columns when printed.
>
> Make sure to test any column blocks you create before making them available in your production environment. There are no restrictions for which columns can be added to a column block, but certain columns, such as column 34395-Patient Photo, do not appear correctly unless they are placed in a section of the column block that has full height.

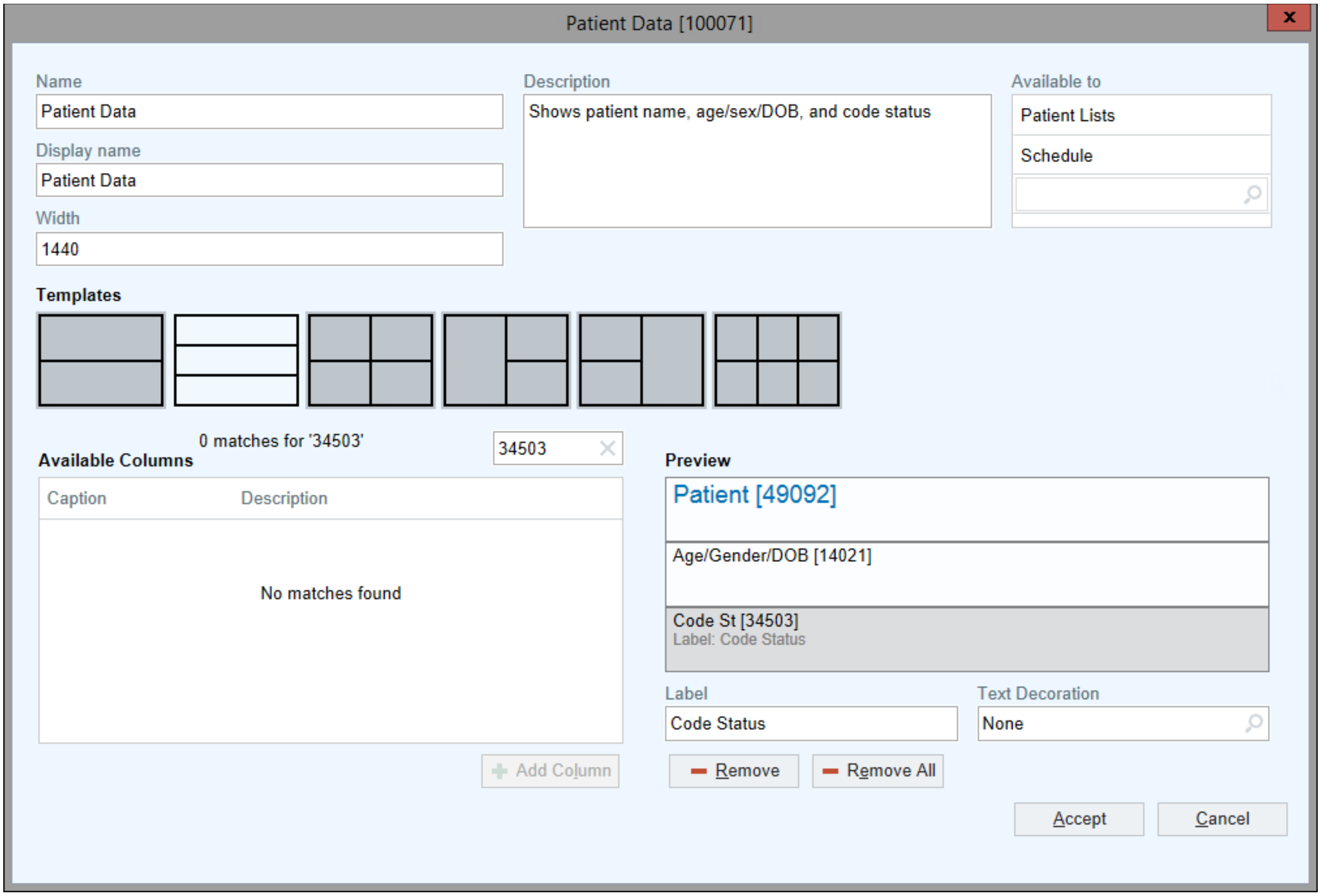


Create Column Blocks

Columns blocks are created in the Column Block Editor. Only users with Inpatient security point 1-Patient List Administrator or EpicCare security point 109-Patient List Administrator have access to this editor. There are six templates to choose from when you create column blocks for your users, allowing you to choose a format that makes the most sense for the information you are showing. Note that you cannot edit released column blocks in this editor. Refer to the Create Customized Column Blocks topic for information about how to make copies of the released column blocks that you can edit.

1. In Hyperspace, go to the Patient Lists activity.
2. On the toolbar, click the arrow next to Edit List. Select Edit Column Blocks. The Column Block Select window appears.
3. Create a new column block, keeping in mind your organization's naming conventions. The Column Block Editor appears.
4. In the Display Name (I FBL 34000) field, enter the caption you want to appear in the patient list header for this column block. This name also appears as the caption of the column block in the My List Editor. Users can use this name to search for column blocks to add to their patient lists. For example, you might name a column that contains a patient's name, age, sex, DOB, and Unit information the Patient Basics column block.
5. In the Description (I FBL 40) field, enter a description of what this column block contains. This description appears in the My List editor next to the caption of the column block. The maximum description length is 508 characters.
6. In the Width (I FBL 34020) field, enter a width in twips. The default width is 1440, and the maximum width is 5000.
7. In the Available to (I FBL 201) field, specify whether the column block is available to the Patient Lists activity, the Schedule activity, or both.
8. Select a configuration for your column block by clicking on one of the templates. The template you choose appears in the Preview pane. If you are editing an existing column block, you cannot change the template without first removing all of the columns from the column block.

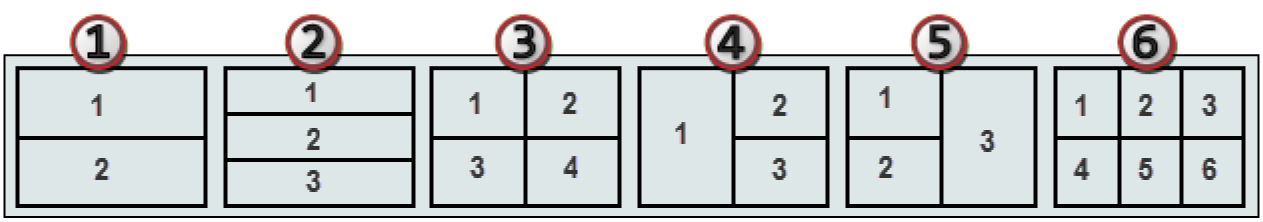
9. Find columns to include in your column block by using the search field above the Available Columns table or by using type-to-search within the table. You can search by column name, key word, or column ID. When you use the search field, the initial results shown in the table are matches from the captions or IDs of the available columns. To see any additional matches from the description field of available columns, click the link that appears next to Still Looking? under the Available Columns table.
10. Add columns to your column block in one of the following ways:
    - Select an open slot in the template in the Preview pane, select a column in the Available Columns table, and click Add.
    - Drag a column from the Available Columns table to an open slot in your selected template in the Preview pane.
    - Double-click a column in the Available Columns table to add it to the first open slot in the template in the Preview pane.
11. Rearrange columns in the Preview pane by clicking and dragging a column to a different spot in the template.
12. For templates that have one or more vertical dividers, you can adjust the proportions of the slots in the template by dragging the vertical dividers left or right in the Preview pane.
13. To add labels to the information that appears in one of the columns, select the column in the Preview pane and enter the text you want to appear in the Label field. For example, you might want "Code Status" to appear next to the code status icon column that you added to a column block so that users can more easily interpret the icons. Note that labels do not appear for patient photo columns or when the columns aren't wide enough to properly show the label.
14. To increase the font size and change the color of the font to match the Hyperspace theme for the information that appears in one of the columns, select that column in the Preview pane and select the Accent Selected Column (I FBL 34050) check box. Only one column per column block can be accented. Columns that contain only icons or that already have highlighting are not accented. Columns that already have colored text retain the font color set in the column, but still increase in size.



Import Column Blocks

If you have a large number of column blocks to create or edit, you can create a source file and then use standard import specification FBL,D,2-Stand Alone Import Specification - FBL. For details regarding importing records, refer to the Standard Import Guide.

Refer to the following diagram and table when assigning block template category values (I FBL 34010) and when determining the order in which you list columns. The first image corresponds to the first line in the table, the second to the second, and so on.



Value	Title	Number of Slots
1	1/1	2
2	1/1/1	3
3	2/2	4
4	1+1/1	3
5	1/1+1	3
6	3/3	6

Create Customized Column Blocks

We recommend using Epic's released column blocks as-is whenever possible so that you can take advantage of any future updates automatically. Refer to the Column Block Catalog for a complete list of the column blocks available to you. If you have a large number of column blocks to edit, you can create a source file and then use standard import specification FBL,D,2-Stand Alone Import Specification - FBL. Refer to the Import Column Blocks topic for details.

If you want to manually edit a released column block, for example, to add a label or accenting to one of the columns, you must first make a copy of it in Chronicles:

1. In Chronicles, enter FBL at the Database initials prompt to open the Column Blocks master file.
2. Follow the path Enter Data > Duplicate Column Block and duplicate the released column block you want to edit.
3. In Hyperspace, go to the Patient lists activity.
4. On the toolbar, click the arrow next to Edit List. Select Edit Column Blocks. The Column Block Select window appears.
5. Open your copy of the released column block and update your copy.

Restrict Users' Access to Certain Column Blocks Using Groupers

If you want to limit which column blocks are available to certain groups of users, you can create grouper (VCG) records and specify which groupers shouldn't be available to certain users through their profiles. You can also restrict column blocks to either the Schedule or the Patient List activity.

Note that when a restricted column is included in a column grouper that is available to a user, the restricted column appears in the Patient Lists activity and the Schedule with Patient Lists activity as part of the column blocks available to that user. Refer to the Give Clinicians Access to Columns in Patient Lists topic for more information about restricting users' access to columns.

To reduce build time and complexity, consider creating a few main grouper records that contain the basic column blocks you want to restrict for certain users at your organization. For example, you might create grouper records containing columns blocks you don't want to appear in an inpatient setting, an outpatient setting, for schedulers, or in other situations. Once you have your basic grouper records created, you can add them to the Grouper Info tab in the Grouper Editor to build the full list of column blocks that you want to restrict based on profiles, instead of listing each column block individually on the General Info tab.

Create the grouper record:

1. In Hyperspace, open the Grouper Editor (search: Grouper Editor).
2. Click the Create tab and enter a name for the grouper record. Click Accept.
3. In the Master file field, enter FBL.
4. In the Type field, enter General.
5. In the Records field on the General Info tab, enter the column blocks you want in this grouper.
6. If applicable, you can enter other grouper records of column blocks that you want included in this grouper record.

Add the grouper record to a profile:

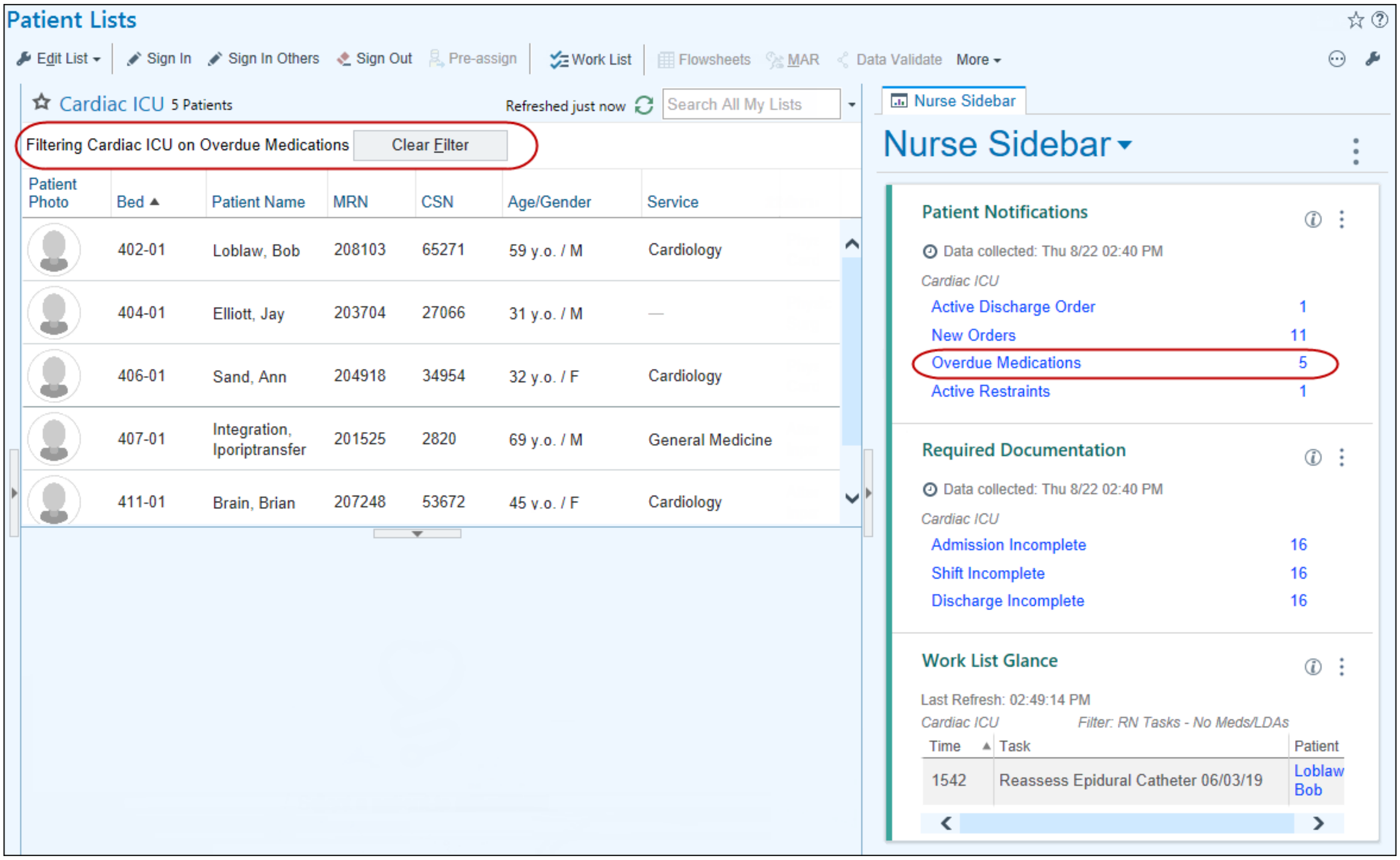
1. In Clinical Administration, go to Management Options > Profiles (LPR), and open the profile to which you want to attach the grouper record.
2. Open the Patient List menu and go to the Patient List Columns screen.
3. In the Restricted column block grouper (I LPR 34490) field, enter the grouper record you created. You can attach only one grouper per profile.

Give Clinicians Access to the Radar Sidebar

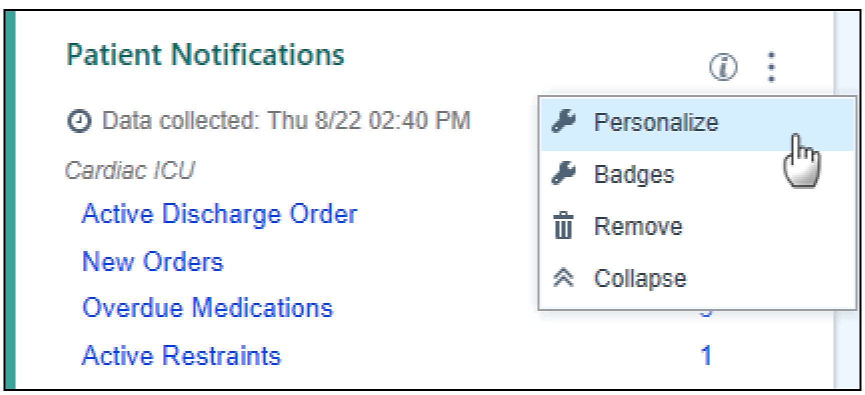
The Radar sidebar gives clinicians even more command over information that is already in your system. Clinicians can use this sidebar to quickly see the outstanding tasks they need to complete for patients on the patient list they are viewing, such as required documentation, dropping charges, or documentation associated with core measures.

To use the Radar sidebar in the Patient Lists activity, you must have the Patient List Personalization license, which is included in the standard EpicCare Inpatient and EpicCare Ambulatory licenses. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

Patient Subset Summary components make it possible for clinicians to filter patient lists of 500 rows or fewer based on what they are viewing in the sidebar. Each line of information in this component type is a clickable filter. For example, when the sidebar indicates that 3 patients have new results, a physician can click either the number 3 or the name of the new results metric to show only those patients in the List pane.



Clinicians can manage their dashboards and open a different dashboard in the sidebar. They can also edit their user settings for components directly from the sidebar by selecting the Options menu that appears in the upper right corner of each component.



We recommend that you use one of the following Epic-released dashboards as the default sidebar dashboard for the Patient Lists activity for your clinicians:

- 34257-IP Nurse Sidebar Dashboard
- 34258-IP Physician Sidebar Dashboard

Each dashboard contains a component for patient notifications and required documentation, tailored to suit the needs of nurses and physicians. In addition, the nurse dashboard contains a component for work list tasks.

Users can view the dashboards they have access to in the Radar sidebar only if one of the following is true:

- The dashboard is configured with a dashboard type (I IDM 200) of Patient Lists.
- The dashboard is listed in their user record as a default sidebar dashboard for Patient Lists (Search: User security > open user record > Radar form).

Clinicians who do not have a default dashboard configured but who do have access to more than one sidebar dashboard through their user roles will initially see an error message in the Patient Lists Radar sidebar. The message indicates that they do not have a default dashboard and gives them the option of opening their other dashboards in the sidebar. Clinicians who don't have a default dashboard and have access to only one sidebar dashboard see that dashboard when the sidebar opens.

Refer to the Create a Patient Summary Subset Component topic for more information about creating this type of dashboard component.

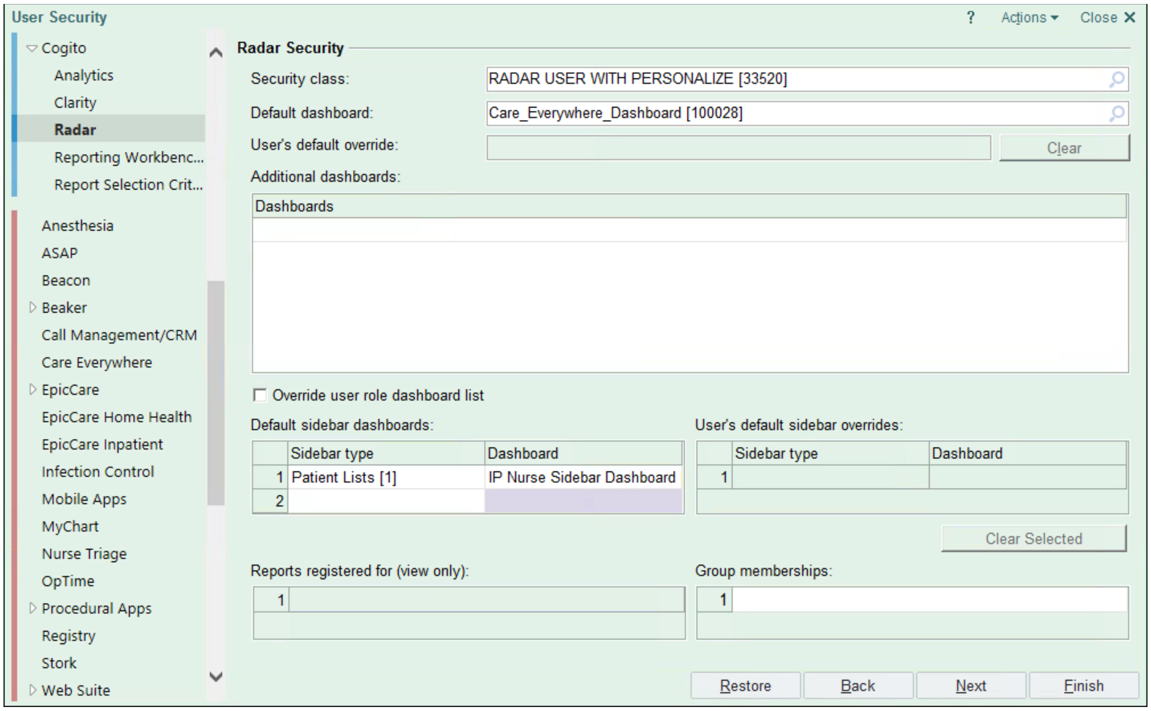
For information on setting up dashboards, refer to the Radar Setup and Support Guide.

Refer to the Give Users Access to Radar topic for more information about giving users Radar security.

Give an Individual Clinician Access to the Radar Sidebar

You can use Hyperspace to give individual users access to the Radar sidebar. However, if you need to give a larger number of users access to the Radar sidebar, we recommend using the Radar Sidebar Build utility available in Clinical Administration.

1. In Hyperspace, open a user record in the User Security activity (search: User Security).
2. Select the Radar form in the Cogito grouper.
3. In the Default sidebar dashboards table:
   a. In the Sidebar type field, enter Patient Lists.
   b. In the Dashboard field, enter the dashboard you want to appear in the sidebar when user first opens the Patient Lists activity. For example, for a nurse, enter your copy of dashboard 34257.
   c. To make additional dashboards available when a user opens the Patient Lists activity, enter the dashboards in the Dashboards field in the Additional dashboards table. In addition to the dashboards you enter here, users can open any dashboards with a dashboard type of Patient Lists as long as the users have access to those dashboards via report groups or user types. Users select the dashboard header to open the mini catalog.



4. Go to the Dashboard Editor and open the dashboard you added to the user's record (search: Dashboard Editor).
5. On the Distribution tab, enter the user's role in the Available to user roles field.

Give Multiple Clinicians Access to the Radar Sidebar

Use the Radar Sidebar Build utility to quickly configure user role records to open a specified dashboard in the Radar sidebar. The utility allows you to:

- Review a list of user roles that indicates how many users have each role.
- Automatically give specified users access to the appropriate released Radar sidebar based on whether the user is a physician or nurse.

Nurses are given access to released dashboard 34257-IP Nurse Sidebar Dashboard. Physicians are given access to released dashboard 34258-IP Physician Sidebar Dashboard. These dashboards are assigned to each role based on clinicians' user type.

1. In Clinical Administration, follow the path Management Options > Utilities > Clinical Utilities > Miscellaneous Clinical > Patient List Radar Sidebar Utility.
2. At the first prompt:
   - Enter Yes to see a list of active roles and how many users have each role listed as their default user role in the Default User Role (I EMP 14300) field in their user record. Make note of which roles you want to configure.
   - Enter No if you know what roles you want to configure and don't want to review the list.
3. At the Role prompt, enter the first user role you want to configure. If you enter a role that does not have the Patient Lists activity configured as its default activity, a message appears verifying whether you want to continue adding the role.
4. If any users with the role you entered do not have security to view Radar dashboards, a prompt appears asking if you want to review a list of such users. At the prompt:
   - Enter Yes to see a list of User IDs for users who will not be able to view the Radar sidebar. Make a

note of the User IDs so that you can add a Radar security point to their security class, if appropriate.

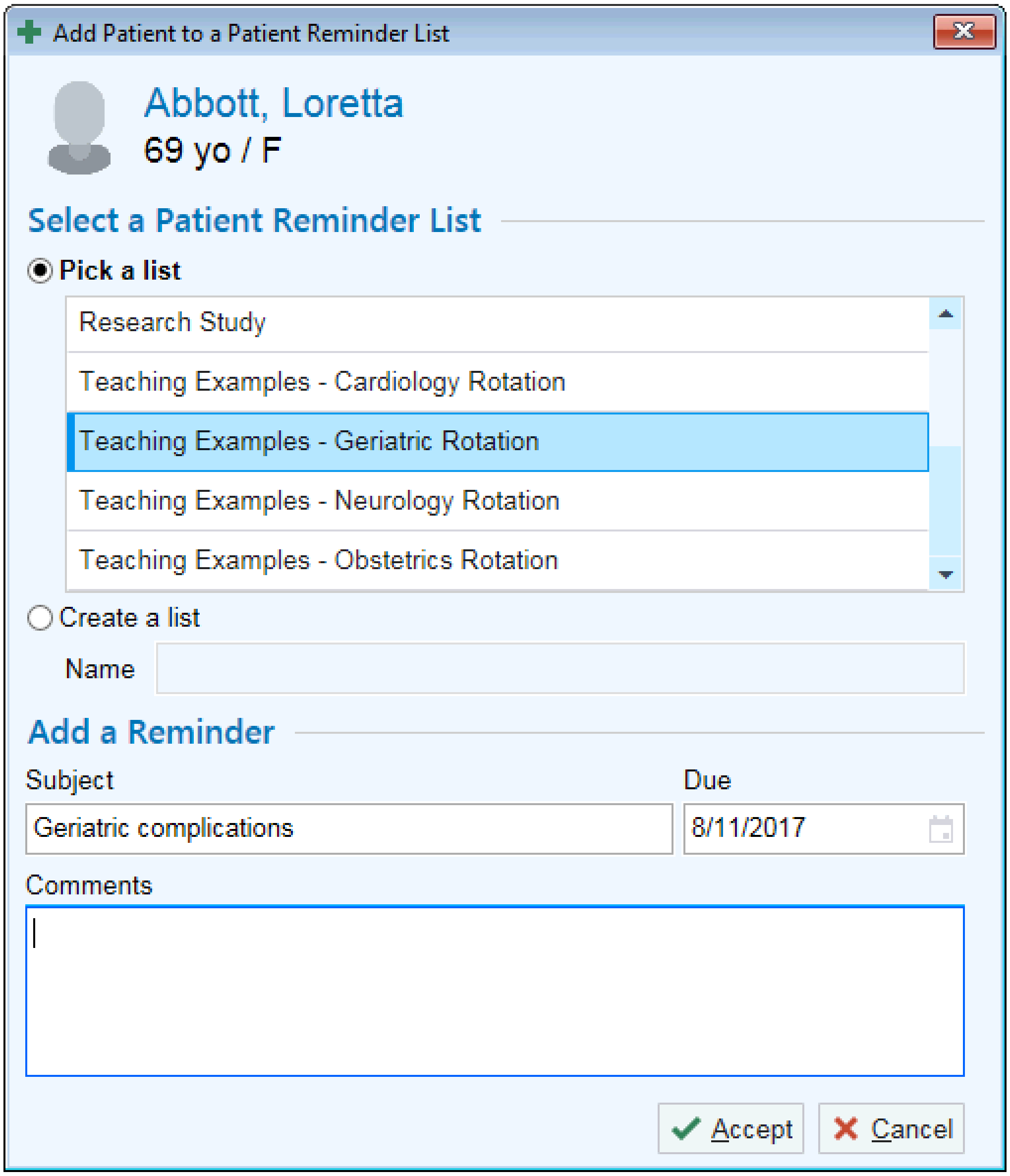
  - At the Continue adding this role? prompt:
    - Enter Yes to continue configuring the user role.
    - Enter No to exclude this user role and continue entering the next user role to configure.

5. At the Role prompt, enter the next user role you want to configure or press Enter to move to the next step.
6. At the Select an ID for the redirector record prompt, press Enter to let the system assign a record ID or enter an ID for the redirector dashboard based on your numbering conventions.
7. At the Select a name for the redirector record, press Enter to name the redirector Patient Lists Sidebar Redirector, or enter a name according to your naming conventions.
8. A message appears giving you the details of the redirector dashboard you are about to create and the roles to which it will be assigned. Enter Yes to create the record or No to return to the main menu.
9. You also need to configure the user template for these roles to have access to the sidebar. To do so:
   a. In Hyperspace, go to the User Security Editor (search: User Security) and open a user template record.
   b. On the Radar form:
      i. In the Additional Dashboards (I EMP 33560) field, enter the redirector record.
      ii. In the Default sidebar dashboards table, enter Patient Lists in the Sidebar type (I EMP 33580) field and enter the redirector record in the Dashboard (I EMP 33581) field.

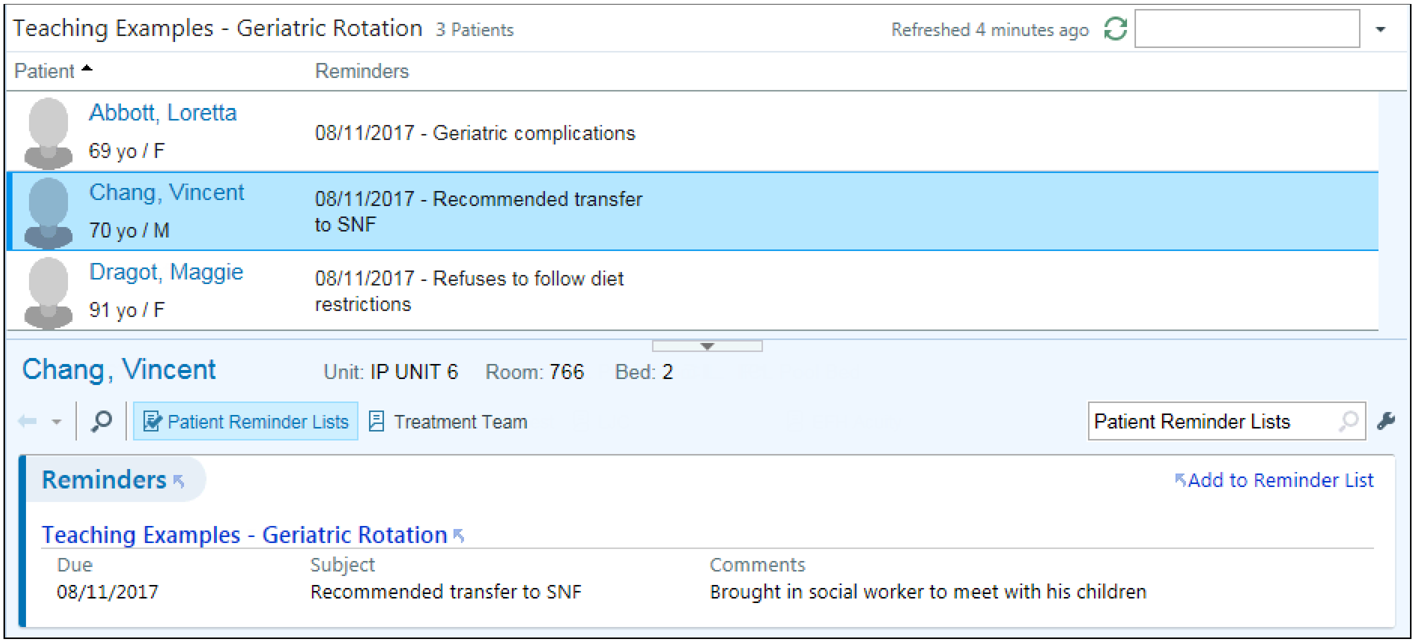
Physician and nurse user types are assigned automatically. Refer to the User Type topic for more information about user types.

Give Physicians Access to Patient Reminder Lists

Patient Reminder Lists allow physicians to quickly add patients to a reminder list from In Basket, from Patient Lists, or within a patient's chart for follow-up later. When a physician adds a patient to a reminder list, she has the option of also creating a reminder by entering a subject specific to that patient, a due date, and (optionally) comments. On the day the reminder is due, she automatically receives a reminder in the My Messages: Pt Reminder folder in her In Basket.



For example, a physician might create a Teaching Examples list to which she adds patients with interesting or complex cases she wants to discuss with her residents during next week's rotation.



As soon as a physician creates a reminder list, it is available in the My Lists section of the Patient Lists activity. Any reminder lists that have been shared with the physician appear in a Shared Reminder Lists folder. Patients stay on reminder lists until they are removed, and reminder lists can't be deleted if there are any active reminders associated with them. This behavior makes it possible for physicians to maintain a list of patients with a certain condition, such as melanoma, and add or remove reminders as needed. To remove a patient from a reminder list, physicians must mark any active reminders as done and then manually remove the patient from the reminder list.

We recommend making Patient Reminder Lists available to both inpatient and outpatient physicians at your organization who need to keep track of follow-ups related to specific groups of patients, but are not related to a particular visit or encounter. The Patient Lists Reminder activity is automatically available from the right-click menu in Patient Lists to users who have an In Basket security class and can send and receive Patient Reminder messages. We recommend that you also make the activity available to physicians from the workspace header.

Prerequisites

Physicians must have the ability to send and receive Patient Reminder messages using In Basket to use Patient Reminder Lists. To grant physicians that ability:

1. Open your In Basket security class for physicians.
2. On the Receive Message Type screen, select Patient Reminder and click Allow.
3. On the Send Message Type screen, select Patient Reminder and click Allow.

If your outpatient physicians aren't already using Patient Lists, you'll also need to configure and train them on using that activity. Additionally, you must have the Reminder Lists license, which is included in the standard EpicCare Inpatient Clinical Documentation and EpicCare Ambulatory licenses. If you're not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

In May 2021 and earlier, users who need to access and act on a shared reminder list also need to have access to the list owner's In Basket. Refer to the Grant A User or Users Access to Another User's In Basket topic for more information. Starting in August 2021, users can directly act on shared reminder lists without attaching to the list owner's In Basket.

Give Physicians Access to the Patient Reminder List Activity from In Basket and Patient Lists

We expect most physicians to access the Patient Reminder Lists activity from either the right-click menu in Patient Lists or from within a patient's chart using column 34562-Patient Header: IP Add to Reminder List in the workspace header. You can also make the activity available from the Patient Lists toolbar or In Basket Sidebar, if physicians would rather access it there:

- To add the Add to Reminder List button to the toolbar used by physicians in Patient Lists, refer to the Add a Button or Menu to an Existing Menu or Toolbar topic. In the Menu Descriptor column, enter IP_IT_PAT_REM_LIST_POPUP. We do not recommend adding this button to the Schedule with Patient Lists activity toolbar because users can't edit reminders from that activity as easily as they can from Patient Lists.
- If you want to add column 34562 to the In Basket Sidebar, refer to the Display Patient-, Setting- and Specialty-Specific Information in the Workspace Header and In Basket Sidebar topic.

Edit Patient List Reminders Directly from In Basket

Starting in May 2022

Physicians can edit patient list reminders directly from In Basket by opening the Edit Patient List Reminders activity from the In Basket toolbar. To add the Edit Patient List Reminders activity to the In Basket toolbar:

1. Open the message type definition (search: Message Type Definition) for your Patient Reminder message type. If you don't already have a Patient Reminder message type set up, refer to the Create a Custom Message Type topic to create one.
2. Go to the Command Buttons tab and add 3401 - IP Edit Patient List Reminders.

Filter Other Clinicians' Reminder Messages from Patient Reminders in In Basket

Starting in May 2022

February 2022 by SU E10101669

November 2021 by SU E9906626

August 2021 by SU E9808697

Users can act on shared reminder lists directly from Patient Lists without attaching to other users' In Baskets. For example, a physician sharing his reminder lists with residents does not need to have each resident individually attach his In Basket to see and act on reminder messages. Pt Reminder In Basket messages are sent to all users who have access to the reminder list for that patient reminder, so users see the messages directly in their own In Basket.

If your users do not want to see patient reminders for all other clinicians that share those reminder lists, you can create a column for them to easily differentiate which reminders come from Patient Lists from reminders that come from In Basket. You can also create filters for them to hide reminders created in Patient Lists. How you complete the filter setup depends on your version. Starting in February 2022, users can use a Patient Reminder column to do their filtering. In November 2021 and August 2021, you can create a filter for users to add.

Show a Patient Reminder Column

1. Open the message type definition (search: Message Type Definition) for your Patient Reminder message type. If you don't already have a Patient Reminder message type set up, refer to the Create a Custom

Message Type topic to create one.

2. Go to the Listing Columns tab.
3. Add a row for Reminder Lists. Set Item to 35010-Patient Reminder List and Format to Just Title.

Users can personalize their view in In Basket to show this column. This column is useful for differentiating which reminders are coming from a Patient Reminder List from reminders created in In Basket.

Starting in February 2022, users can also use that column to filter out reminders created from Patient Reminder Lists. To do so, users must select Filter > Filter by Value > Reminder List column > No Value.

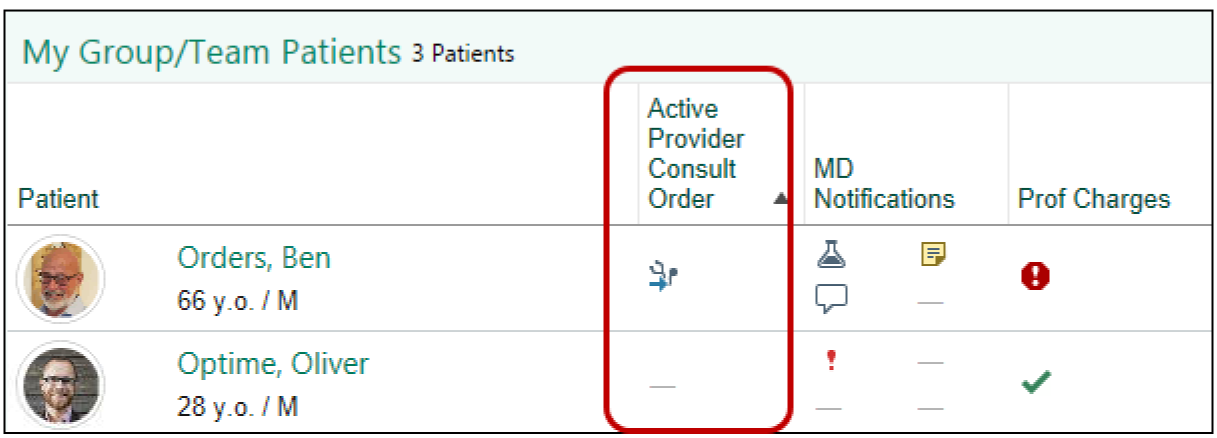
Create a Filter

In November 2021 and August 2021, you cannot use a column for filtering Patient List Reminders in In Basket. Instead, you can create a user filter.

1. Open the message type definition (search: Message Type Definition) for your Patient Reminder message type. If you don't already have a Patient Reminder message type set up, refer to the Create a Custom Message Type topic to create one.
2. Go to the User Filters tab.
3. Add a filter with a title such as Hide Patient List Reminders.
4. For the filter, set the Filter Extension to 36264-IP Patient List Reminders In Basket Filter and set the Enable Extension to 7119-IB Filter Enable.

Show Whether a Patient Has an Active Consult Order

The Active Provider Consult Order column in system lists helps physicians review new consult orders for their service. The column shows an icon if a patient has an active consult order with the specialty in the Active Provider Specialty (I SER 1054) item in the logged-in provider's record. Then, the physician can open the patient's chart to start reviewing the patient's information.



We recommend using Foundation System column 304022681-Active Provider Consult Order. To make it easier for you to get this content, we've created a Turbocharger package with the patient list column and its associated extension and rule. Starting in February 2020, this package is available for download on the Available Packages tab of the Turbocharger activity (search: Turbocharger). For more information about importing this package, refer to the 243476-Patient List Column to Track Active Consult Order topic.

If you don't have these records in your system, complete the following build to replicate them. The build includes a rule, an extension, and a column.

Create a Rule to Check for Consult Orders with the Same Specialty As the Logged-In Provider

To show an icon in the New Consults column, you need a rule that returns true when a patient has an active consult order with the same specialty as the physician.

In the Foundation System, we use rule 304500800-Active Provider Consult Order. If you don't have this rule in your system, complete the following steps to replicate it:

1. In Hyperspace, go to the Rule Editor (search: Rule Editor) and create a new rule using the Patient context.
2. Configure the first condition as follows:
    - From the Properties tree, follow the path Patient > Active Procedure Orders > Ordered Procedure > Procedure Category.
    - In the Operator field, enter Equal to (=).
    - In the Value field, enter the procedure category you use for inpatient consults. In the Foundation System, this is 28-Inpatient Consult Orderables.
3. Configure the second condition as follows:
    - From the Properties tree, follow the path Patient > Active Procedure Orders > Ordered Procedure > Referral Provider Specialty.
    - In the Operator field, enter Equal to (=).
    - In the Value field, follow the path Constant > User > Provider > Specialty.
4. For the evaluation logic, select And.

Create an Extension to Evaluate the Rule

In the Foundation System, we use extension 102813-Active Provider Consult Order to evaluate the rule. If you don't have this extension in your system, complete the following steps to replicate it:

1. In Chronicles, open the Extension (LPP) master file and duplicate extension 74459-ADT RW Rule Evaluation. Give your copy a new name.
2. Open your copy of the extension and enter the ID for the rule you created in the first parameter.

Create a Column to Show New Consult Orders

If you don't have Foundation System column 304022681-Active Provider Consult Order in your system, complete the following steps to replicate it:

1. In Hyperspace, create a new column (search: Column Editor).
2. On the Definition and Formatting tab, configure the fields as follows:
    - Caption (I PAF 70): Enter the caption that you want to appear in the column heading, such as Active Provider Consult Order.
    - Admin description (I PAF 80): Enter a description of the column. In February 2023 and earlier, this is the Technical Description field.
    - Used by (I PAF 200): Enter Inpatient EMR and Reporting Workbench.
    - Field Type (I PAF 90): Enter Extension.
    - Master file (I PAF 40): Enter EPT.
    - Text Ext (I PAF 60): Enter the extension you configured.
    - Data Type (I PAF 350): Enter String.
    - Check the Contact based checkbox (I PAF 470). In February 2023 and earlier, enter Yes in the “Contact Specific?” field.

3. Set other values, such as the fields in the Column Formatting section, as needed.
4. Open the Icons tab and enter the following values in a blank row of the Column Icons table (in February 2023 and earlier, this table can be found in the Definition and Formatting tab):
   - Operator (I PAF 500). Enter Not Equal To (<>).
   - Value (I PAF 450). Leave this field blank. You want to show the icon when the column has a value.
   - Icon (I PAF 515). Click the magnifying glass and select the icon you want. In February 2023 and Earlier, this is the Library field. Select the icon library containing the icon you want.
5. Click Accept to save and close the record.

Give Physicians Access to the Column

To make the column available to physicians, add it to the following records:

- System list groupers that your physicians use to review inpatient physician consult orders using provider teams.
- My List templates that your organization uses for physician groups, provider teams, and inpatient physician consults My Lists.
- Column groupers that should include the column. In the Foundation System, we added this column to column grouper 30400001-IP Physician Columns.

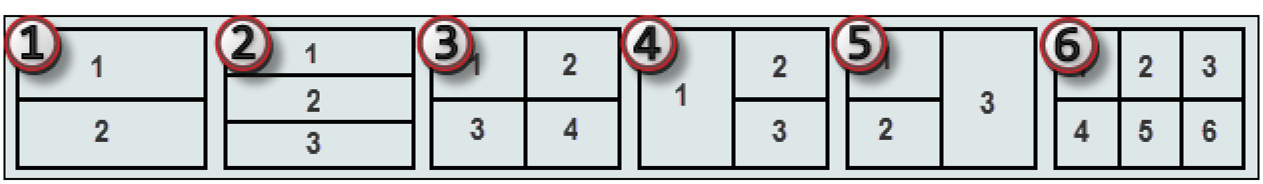
Note that in the Foundation System, we also added column 33420-Referred To Provider to the same column grouper as above. If you haven't done so already, we recommend that you add this column to your organization's equivalent of the Foundation System column grouper. This column helps physicians quickly see if a patient has already been assigned to a specific physician from a provider team.

Column Block Catalog

Column blocks are a type of patient list column that show information from multiple patient list columns at once while maintaining the ability to sort on each individual column in the column block. This catalog describes the Epic-released column blocks that are available for you to use as released in Patient Lists. Note that you cannot edit released column blocks. Refer to the Create Customized Column Blocks topic for information about how to make copies of the released column blocks that you can edit.

Column blocks and columns work together seamlessly, and users can add column blocks to their My Lists directly from the My List Editor they use to add columns to their lists. When column blocks are printed, they are split out into their constituent columns.

Each column block included in this catalog indicates the column block layout by a number. Those numbers refer to the numbers in the following diagram:



Refer to the Create a My List or Shared Patient List topic for information about how to add column blocks to patient lists.

24001-Expected Discharge Date

Starting in February 2025

Display Name: Exp Disch Date

Column Block Layout: 2

Description: This column block contains the patient's expected discharge date (EDD) and how their EDD compares to their Cosmos Median Length of Stay (CMLOS).

Built from the following columns:

- 103-Expected Discharge Date (EPT)
- 94519-Expected Discharge to Cosmos Median Length of Stay

24002-Likely Discharge Dispositions

Starting in August 2025

Display Name: Likely Discharge Dispositions

Column Block Layout: 1

Description: This column block contains the patient's likely discharge dispositions from the Predicted Discharge Disposition cognitive computing model. If the patient has a user-entered discharge disposition, the first row shows the user-entered disposition and the second row shows the most likely predicted discharge disposition. If the patient doesn’t have a user-entered discharge disposition, the first row shows the most likely predicted discharge disposition and the second row shows the second most likely predicted discharge disposition.

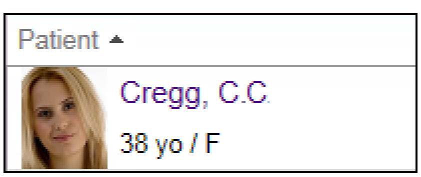
Built from the following columns:

- 94772-Most Likely Discharge Disposition
- 94773-Second Most Likely Discharge Disposition

34000-IP Patient Demographics with Photo

Display Name: Patient

Column Block Layout: 4



Description: This column block contains the patient's photo, name, age, and sex.

Built from the following columns:

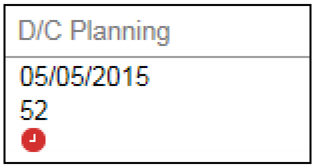
- 34395-Patient Photo
- 34002-Patient Name (With Security Restrictions)

- 34200-EC Patient Age and Sex

34001-IP Discharge Planning

Display Name: D/C Planning

Column Block Layout: 2



Description: This column block contains the expected discharge date, the patient's risk for readmission, and the discharge required documentation status.

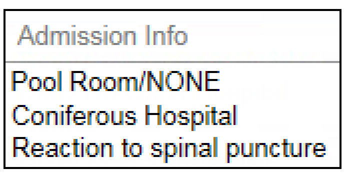
Built from the following columns:

- 103-Expected Discharge Date (EPT)
- 35051-Readmission Risk
- 34804-IP Discharge Required Documentation

34002-IP Patient Admission Info

Display Name: Admission Info

Column Block Layout: 2



Description: This column block contains the patient's room, bed, location, and primary problem.

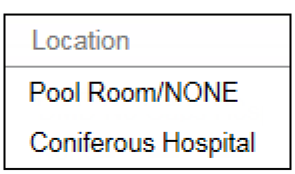
Built from the following columns:

- 34201-IP Room and Bed
- 617-Patient Location (EPT)
- 34078-Primary Problem

34003-IP Patient Location

Display Name: Location

Column Block Layout: 1



Description: This column block contains the patient's room, bed, and location.

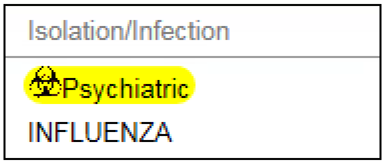
Built from the following columns:

- 34201-IP Room and Bed
- 617-Patient Location (EPT)

34004-IP Isolation/Infection

Display Name: Isolation/Infection

Column Block Layout: 1



Description: This column block contains the patient's isolation and infection status.

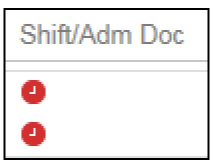
Built from the following columns:

- 34920-Isolation
- 34605-Patient Infection Status

34005-IP Shift/Admission Required Documentation

Display Name: Shift/Adm Doc

Column Block Layout: 1



Description: This column block contains information about shift and admission required documentation:

- A green circle with a check mark means documentation has been performed.
- An empty white circle means documentation has not been performed but is not upcoming.
- A yellow clock face means documentation has not been performed but is upcoming.
- A red clock face with an exclamation point means documentation is overdue.

Built from the following columns:

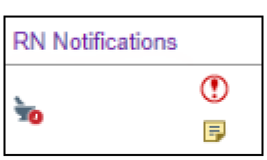
- 34786-IP Req Doc
- 34803-Admisson Required Doc

34006-IP Nursing Notifications

Display Name: RN Notifications

Description: Contains notification icons for nurses.

Column Block Layout: 4



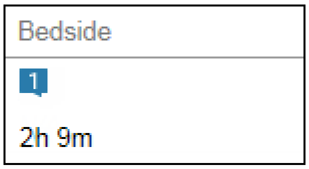
The column block contains notification icons for nurses for overdue meds, new results, and new notes. It is built from the following columns:

- 34026-IP Med Overdue
- 34219-New Result Flag
- 34504-IP New Notes

34007-IP MyChart Bedside Patients

Display Name: Bedside

Column Block Layout: 1



Description: This column block contains information on MyChart Bedside. It shows the number of messages written by a patient or proxy in Bedside since the last time a member of the patient's care team responded and the time since the first unanswered message was sent.

Built from the following columns:

- 96001-Unanswered Bedside Messages Icon
- 96002-Unanswered Bedside Message Age

34008-IP Nurse Orders Management

Display Name: Orders

Column Block Layout: 2

Description: This column block contains information on unacknowledged orders, signed and held orders, and expiring orders.

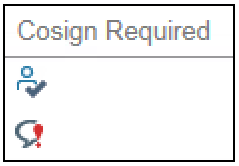
Built from the following columns:

- 33410-Unacknowledged Orders Icon
- 34552-Any Signed and Held Orders
- 54510-IP Orders - Expiring

34009-IP Cosign

Display Name: Cosign Required

Column Block Layout: 1



Description: This column block contains icons indicating notes and orders requiring cosign.

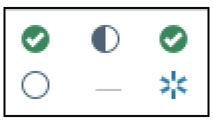
Built from the following columns:

- 34506-IP Notes Cosign Reqd
- 44512-IP Orders - Cosign - Pt Sum

34010-CCM CCSC Decisions and Messages

Display Name: Continued Care

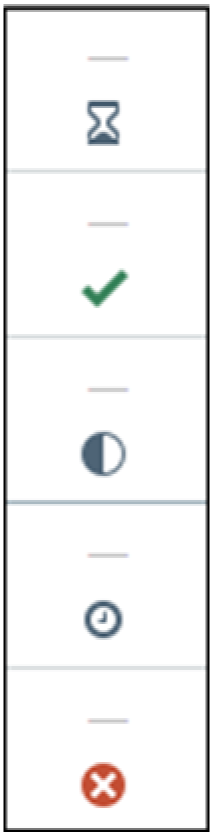
Column Block Layout: 6



Description: This column block shows the status of continued care and services coordination for the patient, as well as how many unread In Basket messages about post-discharge care coordination there are for the patient. The column block shows an icon for each of the five released Continued Care and Services Coordination (CCSC) navigator sections: Destination, DME Coordination, Dialysis/Infusion, Home Medical Care, and Community Resources. The icon changes to show the status of the service requests:

- Green check mark: Post-discharge coordination is complete for that coordination type.
- Gray half circle: At least one decision has been documented from a requested service, but coordination isn't complete yet.
- White circle: Coordination has started, but no decisions have been documented for the coordination type.
- Line: Coordination hasn't been started for the coordination type.

Column 93672-Community Resources Decisions has these icons (Starting in August 2024 and in May 2024 with special update E10900236):



Multiple column blocks in a patient list showing new column's icons.

This column shows an icon that changes to show the status of Community Resource Usage requests:

- Hourglass: There are pending community resource service requests that are not marked as completed.
- Checkmark: All community resource service requests have been accepted.
- Gray half circle: There are both pending and accepted community resource service requests.
- Clock: All community resource requests are historic or won't be used by the patient.
- Red X: All community resource service requests have been declined.

The sixth column shows an icon that changes to show information about CCSC messages:

- Asterisk: There are unread CCSC messages for the patient.
- Checkmark: There are no unread CCSC messages for the patient. There is at least one CCSC message that has been read.
- Line: No CCSC messages have been received for the patient.

When a case manager double-clicks the icon in the sixth column, a patient-specific In Basket view opens, making it easy to see only the messages for the patient she's working with.

Built from the following columns:

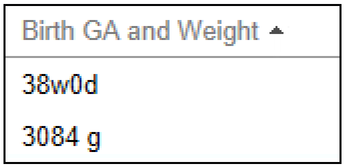
- 33407-Continued Care and Services Coordination - Destination Decisions
- 97038-Continued Care and Services Coordination - Home Care Decisions
- 97036-Continued Care and Services Coordination - DME Decisions
- 93672-Community Resources Decisions (Starting in August 2024 and in May 2024 with special update E10900236)

- 97039-Continued Care and Services Coordination - Community Resources Decisions (in May 2024 without special update E10900236 and in February 2024 and earlier versions)
- 97037-Continued Care and Services Coordination - Dialysis/Infusion Decisions
- 97048-Continued Care and Services Coordination Messages

34012-IP Birth GA and Weight

Display Name: Birth GA and Weight

Column Block Layout: 1



Description: This column block contains the baby's gestational age and weight in grams at birth.

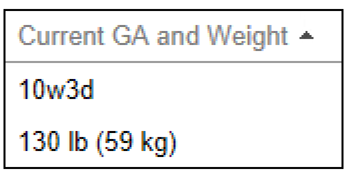
Built from the following columns:

- 14201-Mother's Pregnancy GA / Pediatric GA
- 34086-Patient Birth Weight

34013-IP Current GA and Weight

Display Name: Current GA and Weight

Column Block Layout: 1



Description: This column block shows the age of a pregnant patient or fetus, depending on which patient a clinician is viewing the column for, as well as the current weight of the patient.

Built from the following columns:

- 14209-Mom or Baby Gestational Age
- 54685-Weight - Last (Age-Based Units)

34014-IP Nurse Preceptor

Display Name: Preceptor

Column Block Layout: 2

Description: This column block contains information for a nursing preceptor. The column block shows outstanding flowsheet, medication administration, and note cosign information.

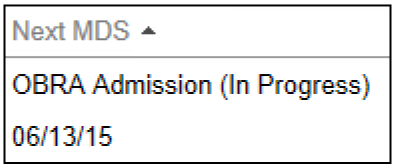
Built from the following columns:

- 49610-Flowsheet - Cosign Required by Me
- 36650-IP Med Admin Cosign
- 34536-IP Notes Cosign Reqd User

34015-LTC Next MDS Assessment

Display Name: Next MDS

Column Block Layout: 1



Description: This column block contains the type and assessment reference date of the next MDS assessment. The information is taken from the next created MDS assessment reference date (ARD) in the future on the resident's current Long Term Care episode.

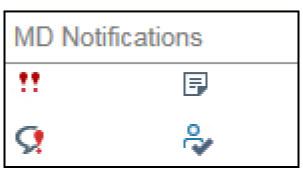
Built from the following columns:

- 44152-Next Created MDS Assessment Type
- 44153-Next Created MDS Assessment ARD

34016-IP Physician Notifications

Display Name: MD Notifications

Column Block Layout: 3



Description: This column contains notification icons for physicians for new results, new notes, orders needing cosign, and notes needing cosign.

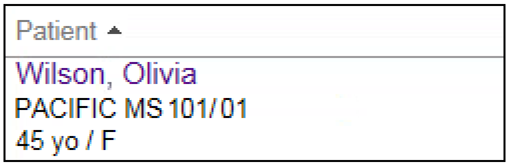
Built from the following columns:

- 34219-IP Result - New Flag
- 34504-IP New Notes
- 44512-IP Orders - Cosign - Pt Sum
- 34506-IP Notes Cosign Reqd

34017-IP Patient Demographics

Display Name: Patient

Column Block Layout: 2



Description: This column block contains the patient name, room, bed, age, and sex.

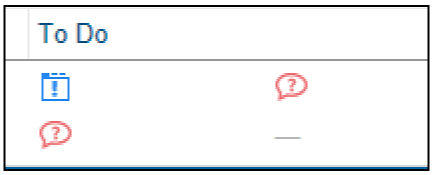
Built from the following columns:

- 34002-Patient Name (With Security Restrictions)
- 34201-IP Room and Bed
- 34200-EC Patient Age and Sex

38999-To Do Task Icons

Display Name: To Do

Column Block Layout: 3



Description: This column block shows icons indicating outstanding deficiencies, coding queries, and CDI queries.

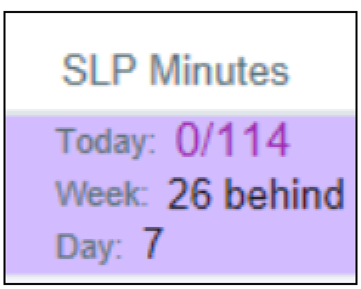
Built from the following columns:

- 38991-HIM To Do Deficiency Icon
- 38992-HIM To Do Coding Query Icon
- 38993-HIM To Do CDI Query Icon

44001-SLP Minutes

Display Name: SLP Minutes

Column Block Layout: 2



Description: This column block shows information relevant to a speech language pathologist for a long term care resident, including the daily minutes of therapy remaining that need to be provided, the current day of the Change of Therapy observation period week, and the weekly standing of minutes provided.

Built from the following columns:

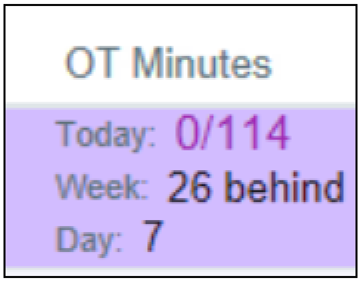
- 44159-SLP Daily Minutes
- 44177-SLP Weekly Minutes Progress

- 44158-Day of COT Period

44002-OT Minutes

Display Name: OT Minutes

Column Block Layout: 2



Description: This column block shows information relevant to an occupational therapist for a long term care resident, including the daily minutes of therapy remaining that need to be provided, the current day of the Change of Therapy observation period week, and the weekly standing of minutes provided.

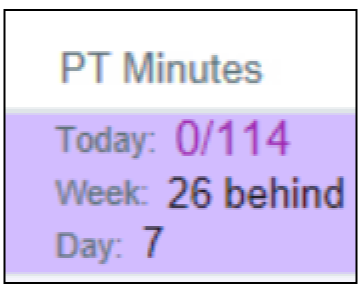
Built from the following columns:

- 44160-OT Daily Minutes
- 44178-OT Weekly Minutes Progress
- 44158-Day of COT Period

44003-PT Minutes

Display Name: PT Minutes

Column Block Layout: 2



Description: This column block shows information relevant to an physical therapist for a long term care resident, including the daily minutes of therapy remaining that need to be provided, the current day of the Change of Therapy observation period week, and the weekly standing of minutes provided.

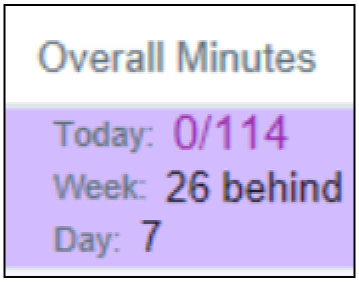
Built from the following columns:

- 44171-PT Daily Minutes
- 44179-PT Weekly Minutes Progress
- 44158-Day of COT Period

44004-Overall Minutes

Display Name: Overall Minutes

Column Block Layout: 2



Description: This column block shows information relevant to an therapists for a long term care resident, including the daily minutes of overall therapy remaining that need to be provided, the current day of the Change of Therapy observation period week, and the weekly standing of minutes provided.

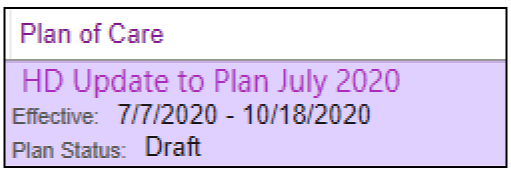
Built from the following columns:

- 44189-Overall Daily Minutes
- 44190-Overall Weekly Minutes Progress
- 44158-Day of COT Period

62000-NEPH Plan of Care

Display Name: Plan of Care

Column Block Layout: 2



Description: This column block shows a patient's most recent plan of care display name, effective range, and status.

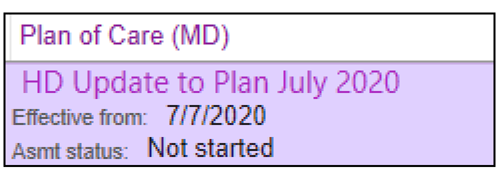
Built from the following columns:

- 62007-Plan Name
- 62083-Plan Effective Range
- 62071-Plan Status

62001-NEPH Plan of Care MD Block

Display Name: Plan of Care (MD)

Column Block Layout: 2



Description: This column block shows a patient's most recent plan of care display name, effective range, and physician assessment status.

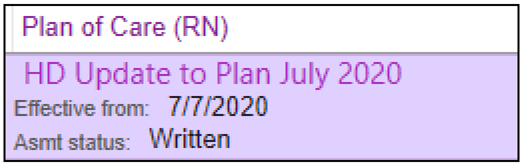
Built from the following columns:

- 62007-Plan Name
- 62068-Plan Effective From
- 62072-Plan MD Ast Status

62002-NEPH Plan of Care RN Block

Display Name: Plan of Care (RN)

Column Block Layout: 2



Description: This column block shows a patient's most recent plan of care display name, effective range, and nurse assessment status.

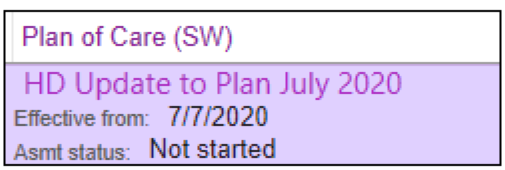
Built from the following columns:

- 62007-Plan Name
- 62068-Plan Effective From
- 62073-Plan RN Asmt Status

62003-NEPH Plan of Care SW Block

Display Name: Plan of Care (SW)

Column Block Layout: 2



Description: This column block shows a patient's most recent plan of care display name, effective range, and social worker assessment status.

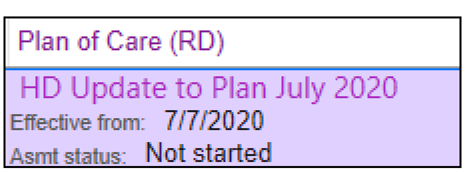
Built from the following columns:

- 62007-Plan Name
- 62068-Plan Effective From
- 62074-Plan SW Asmt Status

62004-NEPH Plan of Care RD Block

Display Name: Plan of Care (RD)

Column Block Layout: 2



Description: This column block shows a patient's most recent plan of care display name, effective range, and renal dietitian assessment status.

Built from the following columns:

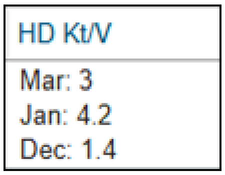
- 62007-Plan Name
- 62068-Plan Effective From
- 62075-RD Asmt Status

62011-Neph Schedule Month HD Kt/V

Starting in May 2025

Display Name: HD Kt/V

Column Block Layout: 2



Description: This column block shows the latest hemodialysis Kt/V values across distinct months. If multiple values exist within a month, the column shows the most recent value.

Built from the following columns:

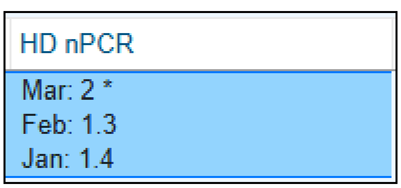
- 62255-Neph Schedule Month HD Kt/V Row 1
- 62256-Neph Schedule Month HD Kt/V Row 2
- 62257-Neph Schedule Month HD Kt/V Row 3

62012-Neph Schedule Month HD nPCR

Starting in May 2025

Display Name: HD nPCR

Column Block Layout: 2



Description: This column block shows the latest hemodialysis nPCR values across distinct months. If multiple values exist within a month, the column shows the most recent value.

Built from the following columns:

- 62258-Neph Schedule Month HD nPCR Row 1
- 62259-Neph Schedule Month HD nPCR Row 2

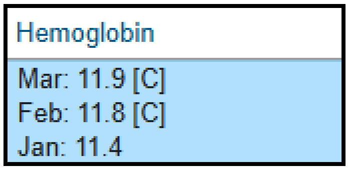
- 62260-Neph Schedule Month HD nPCR Row 3

62013-Neph Schedule Month Hemoglobin

Starting in May 2025

Display Name: Hemoglobin

Column Block Layout: 2



Description: This column block shows the latest hemoglobin values across distinct months. If multiple values exist within a month, the column shows the most recent value.

Built from the following columns:

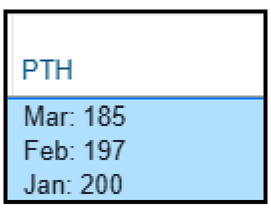
- 62276-Neph Schedule Month Hemoglobin Row 1
- 62277-Neph Schedule Month Hemoglobin Row 2
- 62278-Neph Schedule Month Hemoglobin Row 3

62014-Neph Schedule Month PTH

Starting in May 2025

Display Name: PTH

Column Block Layout: 2



Description: This column block shows the latest parathyroid hormone values across distinct months. If multiple values exist within a month, the column shows the most recent value.

Built from the following columns:

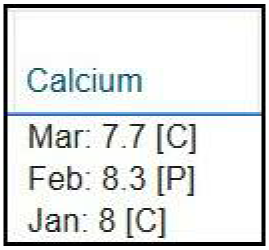
- 62279-Neph Schedule Month PTH Row 1
- 62280-Neph Schedule Month PTH Row 2
- 62281-Neph Schedule Month PTH Row 3

62015-Neph Schedule Month Calcium

Starting in May 2025

Display Name: Calcium

Column Block Layout: 2



Description: This column block shows the latest calcium values across distinct months. If multiple values exist within a month, the column shows the most recent value.

Built from the following columns:

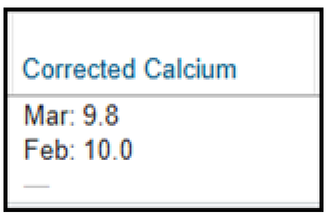
- 62282-Neph Schedule Month Calcium Row 1
- 62283-Neph Schedule Month Calcium Row 2
- 62284-Neph Schedule Month Calcium Row 3

62016-Neph Schedule Month Corrected Calcium

Starting in May 2025

Display Name: Corrected Calcium

Column Block Layout: 2



Description: This column block shows the latest corrected calcium values across distinct months. If multiple values exist within a month, the column shows the most recent value.

Built from the following columns:

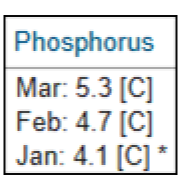
- 62285-Neph Schedule Month Corrected Calcium Row 1
- 62286-Neph Schedule Month Corrected Calcium Row 2
- 62287-Neph Schedule Month Corrected Calcium Row 3

62017-Neph Schedule Month Phosphorus

Starting in May 2025

Display Name: Phosphorus

Column Block Layout: 2



Description: This column block shows the latest phosphorus values across distinct months. If multiple values exist within a month, the column shows the most recent value.

Built from the following columns:

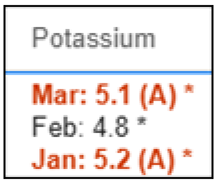
- 62288-Neph Schedule Month Phosphorus Row 1
- 62289-Neph Schedule Month Phosphorus Row 2
- 62290-Neph Schedule Month Phosphorus Row 3

62018-Neph Schedule Month Potassium

Starting in May 2025

Display Name: Potassium

Column Block Layout: 2



Description: This column block shows the latest potassium values across distinct months. If multiple values exist within a month, the column shows the most recent value.

Built from the following columns:

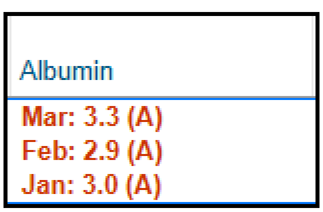
- 62291-Neph Schedule Month Potassium Row 1
- 62292-Neph Schedule Month Potassium Row 2
- 62293-Neph Schedule Month Potassium Row 3

62019-Neph Schedule Month Albumin

Starting in May 2025

Display Name: Albumin

Column Block Layout: 2



Description: This column block shows the latest albumin values across distinct months. If multiple values exist within a month, the column shows the most recent value.

Built from the following columns:

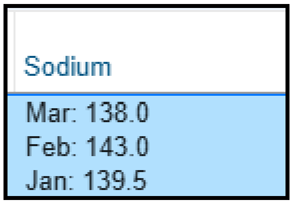
- 62294-Neph Schedule Month Albumin Row 1
- 62295-Neph Schedule Month Albumin Row 2
- 62296-Neph Schedule Month Albumin Row 3

62020-Neph Schedule Month Sodium

Starting in May 2025

Display Name: Sodium

Column Block Layout: 2



Description: This column block shows the latest sodium values across distinct months. If multiple values exist within a month, the column shows the most recent value.

Built from the following columns:

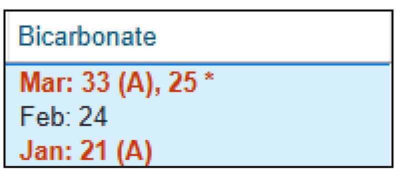
- 62297-Neph Schedule Month Sodium Row 1
- 62298-Neph Schedule Month Sodium Row 2
- 62299-Neph Schedule Month Sodium Row 3

62021-Neph Schedule Month Bicarb

Starting in May 2025

Display Name: Bicarbonate

Column Block Layout: 2



Description: This column block shows the latest bicarbonate values across distinct months. If multiple values exist within a month, the column shows the most recent value.

Built from the following columns:

- 62300-Neph Schedule Month Bicarb Row 1
- 62301-Neph Schedule Month Bicarb Row 2
- 62302-Neph Schedule Month Bicarb Row 3

62022-Neph Schedule Treatment Duration

Starting in May 2025

Display Name: Duration

Column Block Layout: 2

Duration
3/24/25: 215
3/12/25: 238.9
3/4/25: 240.2

Description: This column block shows the latest duration values across distinct treatments. If multiple values exist within a treatment, the column shows the most recent value.

Built from the following columns:

- 62303-Neph Schedule Treatment Duration Row 1
- 62304-Neph Schedule Treatment Duration Row 2
- 62305-Neph Schedule Treatment Duration Row 3

62023-Neph Schedule Treatment UFV

Starting in May 2025

Display Name: UFV

Column Block Layout: 2

UFV
4/1/25: 2.5
3/29/25: 2.4
3/27/25: 2.4

Description: This column block shows the latest ultrafiltration volume values across distinct treatments. If multiple values exist within a treatment, the column shows the most recent value.

Built from the following columns:

- 62306-Neph Schedule Treatment UFV Row 1
- 62307-Neph Schedule Treatment UFV Row 2
- 62308-Neph Schedule Treatment UFV Row 3

62024-Neph Schedule Treatment HD Post Wt

Starting in May 2025

Display Name: HD Post Weight

Column Block Layout: 2

HD Post Weight
3/17/25: 150 lb (68 ...
3/10/25: 150 lb (68 kg)
3/3/25: 152 lb (68.9 ...

Description: This column block shows the latest post-hemodialysis weight values across distinct treatments. If multiple values exist within a treatment, the column shows the most recent value.

Built from the following columns:

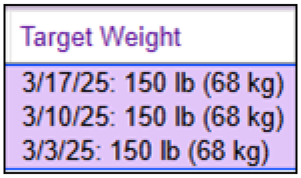
- 62309-Neph Schedule Treatment HD Post Wt Row 1
- 62310-Neph Schedule Treatment HD Post Wt Row 2
- 62311-Neph Schedule Treatment HD Post Wt Row 3

62025-Neph Schedule Treatment Target Wt

Starting in May 2025

Display Name: Target Weight

Column Block Layout: 2



Description: This column block shows the latest target weight values across distinct treatments. If multiple values exist within a treatment, the column shows the most recent value.

Built from the following columns:

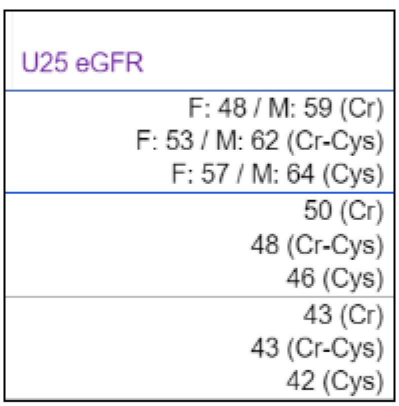
- 62312-Neph Schedule Treatment Target Wt Row 1
- 62313-Neph Schedule Treatment Target Wt Row 2
- 62314-Neph Schedule Treatment Target Wt Row 3

62026-Neph U25 eGFR Scores

Starting in February 2025

Display Name: U25 eGFR

Column Block Layout: 3



Description: This column block shows a pediatric patient's eGFR calculated from creatinine, cystatin C, or a combination of the two. If the patient's sex is ambiguous, two eGFR numbers will be displayed to account for the gender variable.

Built from the following columns:

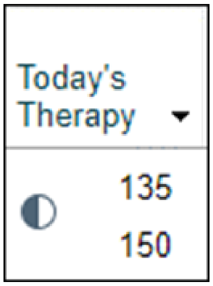
- 62315-Neph U25 eGFR Creatinine Score
- 62316-Neph U25 eGFR Cystatin Score

- 62317-Neph U25 eGFR Creatinine-Cystatin Score

63000-Rehab Today's Therapy

Display Name: Today's Therapy

Column Block Layout: 4



Description: This column block shows a patient's provided and scheduled minutes of therapy for today, information relevant to therapists, PPS coordinators, and other staff at a rehab facility.

Built from the following columns:

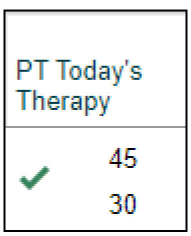
- 63026-Rehab Today's Provided Therapy Minutes
- 63027-Rehab Today's Scheduled Therapy Minutes

63003-Rehab PT Today's Therapy

Starting in February 2024

Display Name: PT Today's Therapy

Column Block Layout: 4



Description: This column block shows a patient's provided and scheduled minutes of physical therapy for today, information relevant to physical therapists, PPS coordinators, and other staff at a rehab facility.

Built from the following columns:

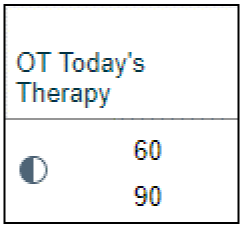
- 63065-Rehab PT Today’s Progress in Therapy Minutes
- 63066-Rehab PT Today’s Provided Therapy Minutes
- 63060-Rehab PT Today’s Scheduled Therapy Minutes

63004-Rehab OT Today's Therapy

Starting in February 2024

Display Name: OT Today's Therapy

Column Block Layout: 4



Description: This column block shows a patient's provided and scheduled minutes of occupational therapy for today, information relevant to occupational therapists, PPS coordinators, and other staff at a rehab facility.

Built from the following columns:

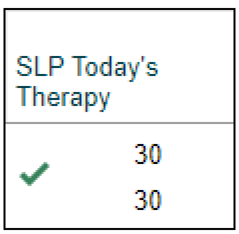
- 63071-Rehab OT Today’s Progress in Therapy Minutes
- 63069-Rehab OT Today’s Provided Therapy Minutes
- 63070-Rehab OT Today’s Scheduled Therapy Minutes

63005-Rehab SLP Today's Therapy

Starting in February 2024

Display Name: SLP Today’s Therapy

Column Block Layout: 4



Description: This column block shows a patient's provided and scheduled minutes of speech therapy for today, information relevant to speech-language pathologists, PPS coordinators, and other staff at a rehab facility.

Built from the following columns:

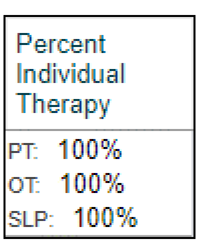
- 63074-Rehab SLP Today’s Progress in Therapy Minutes
- 63072-Rehab SLP Today’s Provided Therapy Minutes
- 63073-Rehab SLP Today’s Scheduled Therapy Minutes

63006-Rehab Percent Individual Therapy

Starting in February 2024

Display Name: Percent Individual Therapy

Column Block Layout: 2



Description: This column block shows the proportion of a patient's therapy for today that was individual therapy, information relevant to therapists, PPS coordinators, and other staff at a rehab facility.

Built from the following columns:

- 63075-Rehab PT Percent Individual Therapy
- 63076-Rehab OT Percent Individual Therapy
- 63077-Rehab SLP Percent Individual Therapy

Patient Lists Setup: Printing

In this section, we'll show you how to set up printing for the Patient Lists activity, including required setup and optional print jobs that you can create.

> **!** You must map the following two printer classes to support server printing from the Patient Lists and Multi Provider Schedule activities:
>
> - 34001-IP Patient Lists
> - 17080-MR Patient List
>
> Alternatively, you can rely on your printer class 1-Default Printer Class mapping.
>
> If you haven't already done so, your Epic representative can help identify workstation and department records that need this printer class added to them. Contact your Epic representative and mention parent SLG 1808127. To set default values for this new printer class, refer to the Use Printer Class Mapping to Send Print Jobs to Printers topic in the Printing and Faxing Setup and Support Guide.

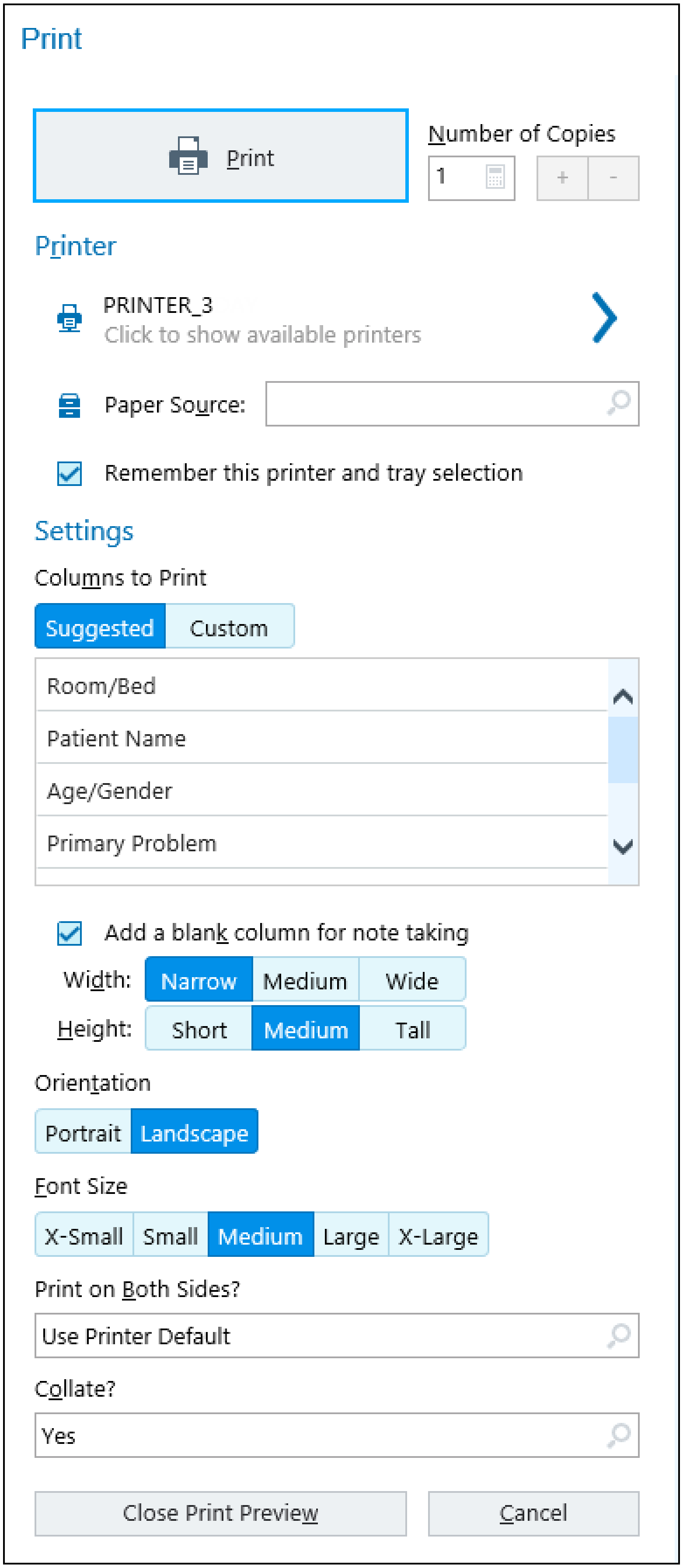
For help troubleshooting patient lists printing, refer to the Patient Lists Support: Common Printing Issues section of this guide.

Create a Suggested Set of Columns for Printing Patient Lists

Although Epic includes options for printing patient lists and the Brain, users must be aware that the information in these printouts can become outdated as soon as it's printed. Users should refer to the system for up-to-date information about the patient's condition or treatment.

Users can control which columns are included in their printout by choosing one of two options:

- Suggested. This printer-optimized mode includes the following Epic-defined columns by default: Room/Bed, Patient Name, Age/Gender, Primary Problem, Attending, Isolation, and Code Status.
  - We recommend that you customize this set of suggested columns for your users at the profile level, to better address how specific groups of users use printed patient lists at your organization. Users cannot change which columns are included in this mode.
  - If the suggested template associated with a given profile has a default sort column listed in the Default Sort Column (I ERS 34015) field, then the system automatically sorts on that column in Suggested mode. If a default column isn't specified in the template, then the list is sorted by the left-most sortable column listed in the template.
- Custom. All of the columns that appear in Hyperspace for the selected list appear in the table, except patient photo columns, which cannot be printed. Users can select which columns they want to include in their printout from this table.



Users can also add a blank column, in a size of their own choosing, to the end of their printed patient lists for handwritten notes. The small, medium, and large options correspond to roughly 10%, 20%, and 30% of the print area, respectively, and work with both suggested and custom mode printouts. Users can customize both the width and height of the blank column in their printed patient list, giving them more control over how much space the column takes up when the list is printed. Users also see a print preview.

Users with a profile for which you don't specify a My List template in the Suggested print template (I LPR 34531) field see the group of basic columns defined by Epic:

- Room and bed
- Patient name
- Gender and age
- Primary problem
- Attending physician
- Isolation status
- Code status

Foundation System Examples

To customize the set of suggested columns users see in the Patient Lists Print Window, create a My List template that defines your suggested columns and attach it to users' profile records. The Foundation System includes the following templates designed for specific groups of users:

- 3040000049-IP IV Team Print Column Template
- 3040000051-IP Child Life Print Column Template
- 3040000052-IP Spiritual Care Print Column Template
- 3040000125-IP Nurse Print Column Template. This template is designed for nurse managers. Nurses who need to print patient information should instead print the Brain.
- 3200000004-CCM Print Column Template
- 3200000005-IP Social Work Print Column Template

To see how these templates are configured, log in to the Foundation Hosted environment as your organization’s inpatient administrator (IPADM), open the Patient Lists activity, and click the arrow next to the Edit List button. Then, select Manage My List Template from the menu that appears. You can also see these lists from the users’ perspective:

1. Log in as the appropriate user. For example, to see the IP Nurse template, log in as your organization’s nurse manager (IPRNMGR).
2. Right-click within a patient list.
3. Select Print List to see which columns are included.
4. Click Open Print Preview to preview the printout.

Configure Suggested Columns

Create the My List Template for suggested columns. Refer to the Use Templates to Generate My Lists for Users Automatically topic for the steps to create a My List template using the Patient Lists Editor. Keep the following build tips in mind as you create your own suggested columns template:

- Column blocks break into their individual columns when printed.
- The patient photo column isn't printed.
- The option for adding a blank column for handwritten notes makes it unnecessary to include column

34384-Jot It Down in your template. However, if users already have a Jot It Down column in their patient list, it will appear as an option when the user selects Custom mode in the print window.

- We strongly recommend not including columns that indicate patient status values that are likely to change often, such as those that show icons for orders needing acknowledgment, because the information shown on the list is likely to become quickly outdated.
- We recommend using text-based columns whenever possible. We strongly recommend not including columns with icons unless you're certain that users will understand them without being able to hover to find more information. Also, keep in mind that many icons use colors to indicate different values, and that meaning is lost if the list is printed in black and white.
- The My List template is also used to determine the suggested columns that appear when the user prints the Unit Manager. Ensure that suggested columns are appropriate for both Patient Lists and the Unit Manager.

After you create a template, attach it to your users' profile record:

1. In Clinical Administration, open the profile record to which you want to assign a customized set of suggested columns.
2. Go to Patient List > Patient Lists and Folders screen.
3. In the Suggested print template (I LPR 34531) field, enter the My List template you created for suggested columns.

Give Users the Print List Option in the Right-Click Menu

You can add Print List options to the menu that appears when a user right-clicks a patient list in the List pane. The Patient List Printing window allows users to choose the best layout for their list.

1. In Clinical Administration, follow the path Management Options > Edit System Definitions (LSD) > Patient List.
2. On the Patient List Settings screen, enter Yes in the Show right-click print option? field. If you leave this field blank, the Print List option does not appear.

Let Users Print Patient Lists to the Nearest Printer

You can use print profiles to allow users who either work from a computer that uses Citrix roaming or log in to virtual departments to print patient lists to the printer that is nearest to them. Refer to the Let Users Override Order Transmittal and Report Routing with a Print Profile topic for detailed setup steps. When configuring the print profile, enter the following values in a row of the Workstation Device Defaults table:

1. In the Classification (I LWS 400) field, enter an appropriate printer class for patient lists:
   - For inpatient users, enter printer class 34001-IP Patient Lists.
   - For outpatient users, enter printer class 17080-MR Patient Lists.
2. In the Remote Device (I LWS 406) field, select a default printer for this print class.
3. In the Ask (I LWS 410) field, enter No.
4. In the Option (I LWS 415) field, enter Remote.

Give Users a Batch Printing Button in Patient Lists

You can give users a button in the Patient Lists and Schedule activities so they can initiate batch printing for patient list reports.

Security for this feature varies by version:

- In November 2023 and earlier, the button appears in the Patient Lists activity if clinicians have EpicCare Inpatient security point 143-Print Patient(s) Report from Patient List or EpicCare security point 22-Schedule.
- Between February 2024 and November 2024, the button appears the in Patient Lists activity if the clinicians need Inpatient security point 143-Print Patient(s) Report from Patient List.
- Starting in February 2025, the button appears in the Patient Lists activity if the clinicians have EpicCare Inpatient security point 143-Print Patient(s) Report from Patient List or EpicCare security point 22-Schedule.

First, add the Patient Report button to a toolbar:

1. In Hyperspace, go to the Role Editor (search: Role Editor) and open the user role record for the users you want to give access to this button.
2. In the Menu Information table, enter the menu record of the toolbar to which you want to add the Patient Report button in the Menu to Extend (I E2R 40) field. For example, to add the button to the released Patient Lists toolbar, enter IP_MT_PATLIST. To add it to the released Schedule toolbar, enter MR_MT_MULTI_PROV_SCHEDULE.
3. In the Menu Descriptor (I E2R 45) field, enter IP_IT_PAT_REPORT.
4. In the Override? (I E2R 50) field, enter No.

To specify patient list reports that users can print, list the reports in the appropriate profile. Note that if reports are listed in multiple profiles that apply to a user, such as his user profile and in EMR System Definitions, that user sees a compilation of all of those reports.

1. In Clinical Administration, follow the path Management Options > Profiles (LPR) and open a profile.
2. Select Patient List and go to the Patient List Report Printing screen.
3. In the Reports available to print (I LPR 34320) field, enter the reports you want the user to be able to print.

Print SmartText Labels for All the Patients on a Patient List

You can allow users to easily print SmartText labels for all the patients on a list directly from the Patient Lists activity by adding the Print Labels button to the Patient Lists toolbar. Note that if a user prints labels using the Print Labels button, labels are printed for patients protected by Break-the-Glass.

This setup assumes that you have already configured the labels you want users to be able to print and created a report that contains print groups that show labels.

1. In Clinical Administration, open the profile record of the users who you want to be able to print labels.
2. Go to Patient List > Patient List Reports screen.
3. Add your report to the Available Patient List Reports field.
4. In Hyperspace, go to Admin > Access Management > Role Editor, and open the user role you want to edit.

5. In the Menu Information table, select IP_MT_PATLIST in the Menu To Extend column.
6. In the corresponding Menu Descriptor column, enter IP_IT_PATLST_LABEL.
7. Click Finish.

Print SmartText Labels in a Batch Job for Patients on a System List

You can print patient labels that use SmartTexts in batch jobs for patients who appear on a system list. You can configure the labels' size and layout within the SmartText, and you can add patient- or order-based SmartLinks so that specific patient data appears on the labels.

1. Create a SmartText that includes SmartLinks. Note that the SmartLinks must have the same context as the SmartText. Also configure the size and layout of the SmartText.
2. Duplicate print group 54121-SmartText Display.
3. In the copy of print group 54121, enter the ID of the SmartText you created in step 1 in the SmartText ID field on the Print Group Configuration (Rich Text) screen.
4. In Clinical Administration, create a report.
5. Enter the copy of print group 54121 you created in step 2 in the Rich Text LPG field.
6. Create a batch job based on batch template 34100. For more information about creating batch jobs, refer to the Define a Job from a Template topic.
7. In the batch job, specify a system list, the report you created in step 4, and a printer. Set the SmartText Label? mnemonic to Yes.

Print Diet Labels for Patients on a System List

You can print diet labels for patients who appear on a system list that you create. You can then use this system list to print labels in a batch job, or you can allow users to print labels based on this system list. The Foundation System includes a label SmartText that you can use as the basis for your diet labels. You can see this record by logging in to the Foundation Hosted environment as your inpatient administrator and opening SmartText 16749-IP Diet Label in the SmartText Editor (search: SmartText).

This feature is also available in a Turbocharger package. To add it to your system, contact your Epic representative and mention PRJ 191454.

1. Complete the setup to Print SmartText Labels in a Batch Job for Patients on a System List.
2. Starting in May 2023, in Hyperspace, open the Filters Editor for the Orders System Lists activity in one of the following ways:
    - From the Patient Lists activity, open the Edit List menu and select Manage Order List Filters.
    - Follow the path Epic button > Tools > Inpatient Tools > Patient List Management Utilities > Manage Order List Filters.
3. In February 2023 and earlier, in Clinical Administration, go to Management Options > Edit System Definitions (LSD) > Patient List > System List Filter Settings screen.
4. Create a system list filter that includes the orders you want associated with the system list. For example, enter diet orders so that patients with those diet orders appear on the system list.
5. In Chronicles, duplicate extension record 88213.
6. Configure the parameters of the copy of extension record 88213:

- In the Diet Order System List Filter parameter, enter the system list filter you created in step 2.
- In the Frequency parameter, enter the order frequencies you want to include. This parameter is optional. If you leave this parameter blank, all order frequencies are included.
- In the SmartText Contexts parameter, enter the SmartText context you used when you created the SmartText if you used a context other than Rx Medication Label.

7. In the report you created earlier, enter the copy of extension record 88213 in the Report Setup field.
8. In Hyperspace, create a system list that uses your system list filter.
9. Use this system list to print the diet labels in a batch job or allow users to print labels based on it.

Patient Lists Setup: Bells & Whistles

In this section, we'll show you more configuration options for the Patient Lists activity. Not all of these options are currently built in the Foundation System, but they might be appropriate alternatives to the Foundation System build or useful in specific scenarios. They also allow for further configuration of the behavior and appearance of the Patient Lists activity.

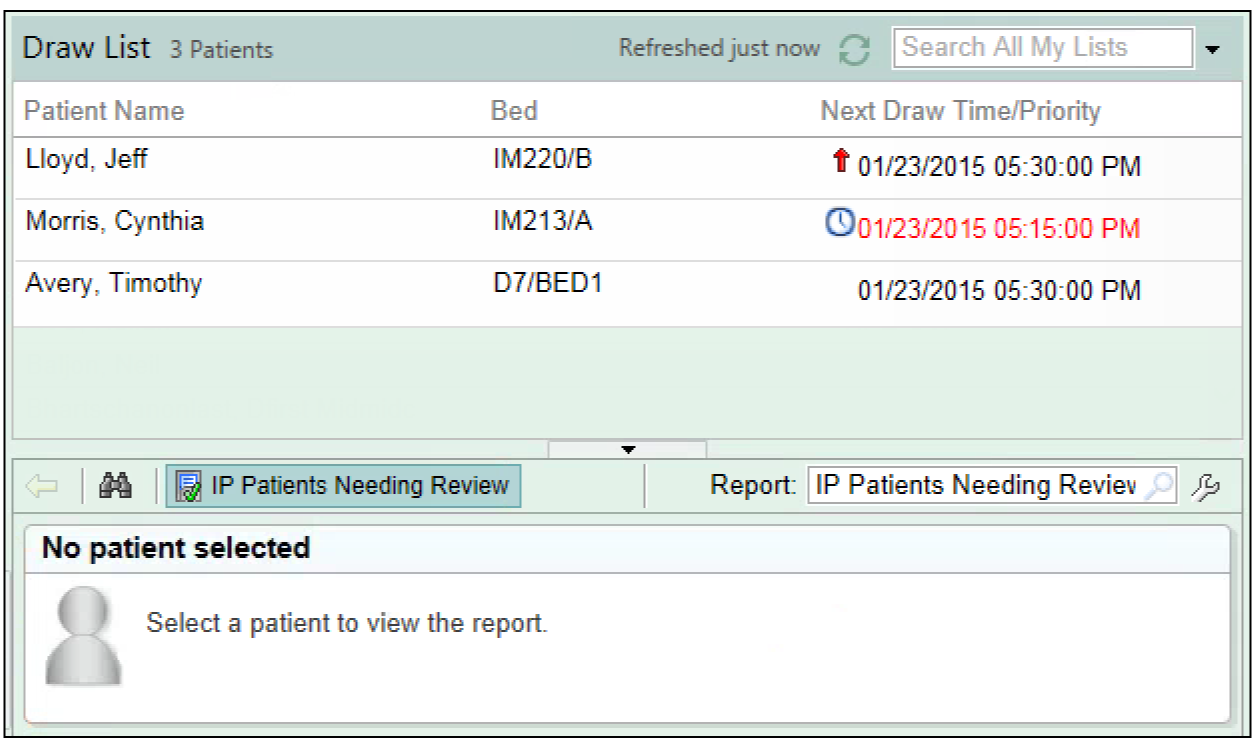
Sort Draw Lists by Priority and Next Draw Time

To help phlebotomists anticipate timed and high-priority orders for patients on their draw lists, you can add a column that sorts their draw lists by priority first and by nearest draw time second. When phlebotomists sort their draw lists with column 51312-Lab DL Prioritized Expected Draw Time/Priority, which appears in patient lists as the Next Draw Time/Priority column, all STAT orders appear at the top of the draw list. Timed orders appear next, followed by all other orders. If the draw time for any order on the draw list passes, the collection date and time appear as red text.

Column 51312 determines which order's draw time to show for a patient with the following logic:

- If the patient has a high-priority order, the nearest collection time for a high-priority order appears with a red arrow icon.
- If the patient has no high-priority orders but has a timed order scheduled no later than two hours after a routine order, the collection time for the timed order appears with a clock icon. You can configure how soon after a routine order that a provider must schedule a timed order for the column to show the timed order instead of the earlier routine order.
- If the patient has no high-priority orders or timed orders, the nearest collection time for any order appears with no icon.

Note that this column shows information only for orders on draw lists. When phlebotomists select specific draw lists or My Lists containing draw lists, only orders from these draw lists appear. Otherwise, the column shows information about orders from any draw list.



As released, timed orders scheduled up to two hours after a routine order will appear in column 51312 instead of the routine order. If you want to change this length of time, you need to configure a copy of extension 51612-Lab DL Prioritized Draw Time and add it to a copy of column 51312.

To configure your copy of extension 51612:

1. In the extension (LPP) master file in Chronicles, duplicate extension 51612.
2. From the extension master file in Chronicles, go to Enter Data > Create/Edit Extension and open your copy of the extension.
3. On the Parameters screen, tab to the Value field for the Timed Priority Window parameter and enter how close, in minutes, a timed order must be scheduled to a routine order for the timed order to appear instead.

To configure a copy of column 51312 that uses your extension to determine when timed orders can appear instead of routine orders:

1. In Hyperspace, open the Column Editor (search: Column Editor)
2. On the Create New Column tab, complete the following fields and click Accept:
   - Column name: Enter a name for your column.
   - Copy from: 51312
3. On the Definition and Formatting tab, enter your extension in the Text Ext (I PAF 60) field.

To add the Next Draw Time/Priority column to phlebotomists' draw list, you must make the column available to them in their profiles, then add the column to the system list grouper containing the system lists that phlebotomists use as draw lists. To make the column available to phlebotomists:

1. In Clinical Administration, go to Management Options > Profiles (LPR)
2. Open the profile used by your organization's phlebotomists and go to Patient Lists.
3. On the Patient List Column screen, enter the column.

To add the column to a system list that phlebotomists use as a draw list:

1. In Hyperspace, go to Patient Lists:
   - Search: Patient Lists
   - Path: Epic button > Patient Care > Patient Lists
2. Select the system list grouper containing the system lists that phlebotomists at your organization use as draw lists.
3. Click the Edit List button and select Properties.
4. In the Search field, enter Next Draw Time/Priority or the name of your copy of the column.
5. Select the column and click Add.

Show High Priority Icons Only When High Priority Orders Are in a Draw List

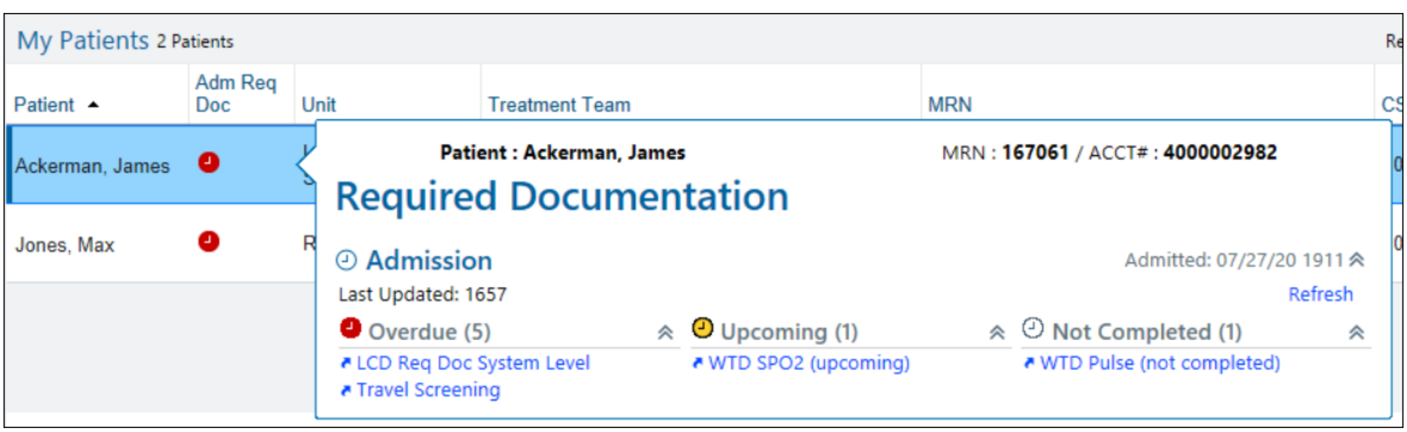
If you want to filter which orders are evaluated in a My List draw list, as well as have more flexibility in specifying which orders are considered when the system evaluates whether to show a high priority icon for a patient, you can create a Lab Order context rule, plug it into a copy of extension 51876-Patient Lists: High Priority Order Icon Ext, and add the extension to a copy of column 51152. For example, you might build a rule that evaluates whether the order is on a phlebotomy draw list so that when phlebotomists see a high priority icon, the icon is only for patients with high priority active orders that phlebotomy needs to collect.

1. In Hyperspace, create a Lab Order Context rule that determines whether an order is considered when the system checks for high priority orders associated with a patient. For more information about creating rules, refer to the Create or Edit a Rule topic.
2. In Chronicles, open the Extension (LPP) master file.
3. Follow the path Enter Data > Duplicate Extension and duplicate extension 51876-Patient Lists: High Priority Order Icon Ext.
4. From the Enter Data Menu, go to Edit Extension and open your copy of extension 51876.
5. Page down to the Parameters screen and enter your rule from step 1 in the second parameter.
6. In Hyperspace, open the Column Editor (search: Column Editor) and create a new column.
7. In the Copy From field, enter 51152 to copy the released Patient Lists: High Priority Order column.
8. In the Image Ext. field, enter your copy of extension 51876.
9. In Hyperspace, go to Patient Lists and select a draw list.
10. Go to Edit List > Properties and add your new column to the Selected Columns list.
11. If desired, you can choose to make released column 51152 unavailable to clinicians, so that only one high priority order column appears in a draw list. To do this, list the columns you do want clinicians to have access to in their profile record. For more information about how to determine which columns are available to clinicians, refer to the Give Clinicians Access to Columns in Patient Lists topic.

Show a Print Group in an Informational Bubble for a Patient List Column

Starting in November 2020

To help users quickly access more details related to the information they see in patient list columns, you can use an extension that's configured to show a report (LRP) in a hover bubble. This report appears in an informational bubble when users hover their cursors over a patient list column that's associated with the extension. For example, you could add a report that shows required documentation when a clinician hovers their cursor over the Admission Required Documentation column. Note that not all reports are intended for use in hover bubbles for patient list columns. For example, reports configured for Storyboard and reports with links to patient acuity scores don't appear as expected in hover bubbles for patient list columns. Test your hover bubbles for patient list columns before using them in a live environment.



To create a hover bubble that shows a report when clinicians hover their cursor over a patient list column, create an extension that lists the report:

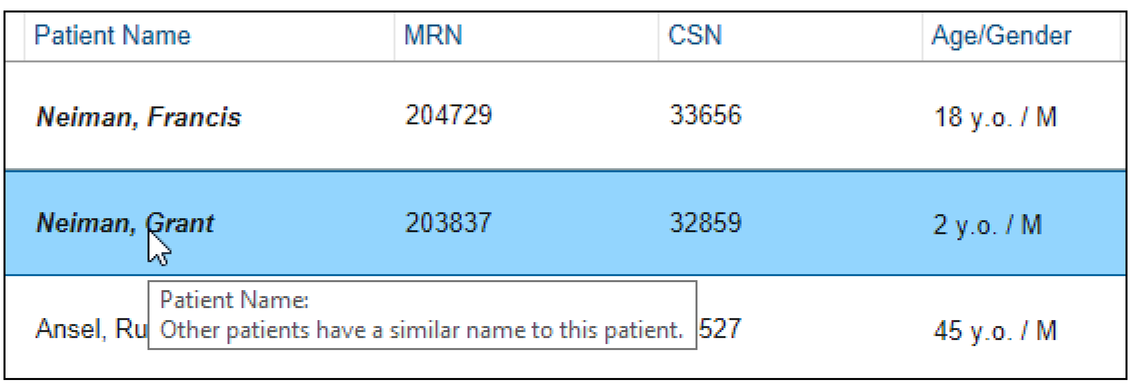
1. In Hyperspace, open the Extension activity (search: Extension).
2. Enter the name of your new extension and click Create.
3. Enter the ID you want to use in the Extension ID field or leave the field blank to have the system automatically assign an ID for you. Click Create.
4. Enter 523-Reporting Workbench Hover Bubble in the Type (I LPP 30) field.
5. Enter 490548-HOVERBUBBLE-JEDPAFHOVERBUBBLE in the Code template (I LPP 1000) field.
6. Enter the report that you want to appear in the Value field for the Hover bubble report parameter. You can identify the right report or create a new report following instructions in the Create a New Report Topic. Not all reports are intended for use in hover bubbles for patient list columns, so be sure to test the hover bubbles before using them in a live environment.
7. Click Accept to save and close your new extension.

Link the extension to a patient list column:

1. In Hyperspace, open the Column Editor (search: Column Editor).
2. Open the column that should show the hover bubble with the report.
3. Enter the extension you created in the Hover Bubble ext (I PAF 170) field. In February 2023 and earlier, open the Application Specific Features tab and enter your extension in the Hover Bubble ext field.

Determine Which Patient Names Are Considered Similar

When patients have similar names in a list that a user is looking at, visual emphasis for those names can help staff ensure they're reviewing the intended patient's information or opening the intended patient's chart. You specify what name properties to evaluate when determining whether patient names should be emphasized as similar.



To determine how patient names are considered similar, follow the steps below at the system level or for individual profiles. Keep in mind that the same settings that determine which patients are considered similar apply to all activities.

1. In Clinical Administration, open a profile or EMR System Definitions, depending on where you want to configure these settings.
2. Find the setting you need to configure:
   - If you're configuring this setting at the profile level, use the fast forward feature (Home+F9) to go to item 960000 on the Similar Name Highlighting Settings screen.
   - If you're configuring this setting at the system level, use the fast forward feature (Home+F9) to go

to item 96000 on the Similar Name Highlighting Settings screen.

3. In the Name properties to use (I LPR 960000 or I LSD 96000) field, enter a list of name-matching properties to use to determine whether two patients' names are similar enough to be highlighted. Choose from the following properties:
   - Last Name Sounds Like
   - Exact First and Last Name
   - Exact Last Name with Dominant Name Alias
   - Exact Last Name and First Name Sounds Like
   - Exact Last Name
   - First and Last Name Sounds Like
   - First Name Sounds Like (if you choose this option, refer to the troubleshooting section below)
4. In the Distance matching name (I LPR 960001 or I LSD 96001) field, enter whether distance matching is applied to the patient's first name, last name, or both. Distance matching determines whether a name looks like another name. If you choose First Name, refer to the troubleshooting section below.
5. In the Distance matching threshold (I LPR 960002 or I LSD 96002) field, enter a percentage for how similar two names must be to be considered a match. For example, if this is set to 75, names with 1-4 characters would require an exact match, names with 4-7 characters would need to be within one character of each other, names with 8-11 characters would need to be within two characters of each other, and so on. This field applies only if there is a value in the Distance matching name (I LPR 960001 or I LSD 96001) field.
6. At the profile level only, in the First name truncation (I LPR 960003) field, enter the number of characters to truncate the patient's first name to for the purposes of matching similar names. This setting matches patient names based only on the truncation that end users see. If your organization has configured names to be truncated using the First name truncation (I LPR 960003) field or the Last name truncation (I LPR 960004) field, the number of characters in this setting should match that one.
7. At the profile level only, in the Last name truncation (I LPR 960004) field, enter the number of characters to truncate the patient's last name to. The considerations for the First name truncation (I LPR 960003) field apply to this field as well.
8. At the profile level only, in the Filter mom-baby matches? (I LPR 960005) field, enter No or leave the field blank if you want parent and baby names to be highlighted as similar names. Enter Yes if you don't want parent and baby names to be highlighted. If you're configuring this setting for a Labor and Delivery context, we recommend setting it to Yes.
9. At the profile level only, in the Data matching columns (I LPR 34036) field, enter the columns in which you want to show similar name indicators. Enter only columns that display text, not icons. The formatting appears automatically in the following columns, but not in duplicates of them:
   - 17302-Patient Name
   - 34002-Patient Name
   - 34204-Patient Name/Age/Sex
   - 34915-Patient Name (With Security Restrictions and Preferred Name)
10. At the profile level only, in the Match restricted patients? (I LPR 34521) field, enter No or leave the field blank to disable similar name indicators for restricted patients and patients who match restricted patients. Enter Yes if you want to use similar name indicators whenever patients have similar names to other patients on a schedule or patient list, including restricted patients. If you enter Yes, then in the Schedule at

a Glance component, similar patient names are highlighted

Troubleshooting: Accounting for Preferred Names When You Use First Name Matching

If you set up similar name highlighting using first name matching, be aware that the system uses the patient's preferred name to determine what is similar. As such, if you show patients' legal names in Patient List columns, this can lead to the system not highlighting a patient's name as similar when a user might expect it to be highlighted.

For example, patient A and patient B have similar legal names but do not have similar preferred names. Because the preferred names are not similar, the system doesn't highlight them. However, if users view a column that shows the patient's legal names, they might see for themselves that the legal names look similar and not know why they are not highlighted as such.

To avoid this potential confusion, if you are using first name matching and preferred names, we recommend that you customize you patient name columns to include the patient's preferred name. That way, users can see why the names aren't considered similar and more easily identify which patient is which. To do so:

1. In Hyperspace, open the Column Editor (search: Column Editor) and create a copy of the column you want to update.
2. In your copied column, go to the Definition and Formatting screen, in the Text Extension (I PAF 60) field, take note the ID of the extension that's used to display the patient's name.
3. In Chronicles, access the Extension (LPP) master file and make a copy of the extension you identified.
4. Open your extension copy and, using the record's help text, identify the parameter that determines how the patient's name appears. Set it to a value that includes the patient's preferred name.

Hide Part of Patients' Names on Patient Lists

Some patient lists appear on public screens, such as pre-login screens. To maintain patient privacy, use column 17302-MR Multi Prov Schedule Patient Name and choose how many letters of patients' names appear in the column. For example, you can set the column parameters to show three letters of the last name and two letters of the first name so that a patient named Theodore Merring appears on the list as Mer, Th.

1. In Hyperspace, open the Column Editor (search: Column Editor).
2. On the Search Existing Columns tab, enter 17302-MR Multi Prov Schedule Patient Name.
3. In the Definition and Formatting tab, note the extension in the Text ext field.
4. In Chronicles, open the Extension (LPP) master file.
5. Follow the path Enter Data > Duplicate Extension and enter the extension that you noted earlier from column 17302 to create a duplicate.
6. Using your numbering conventions, enter an ID above 100,000 for the new extension. Epic recommends using a three-digit prefix for your application or specialty.
7. Enter a new name for the duplicate extension that describes its purpose.
8. Type Yes to duplicate the extension.
9. To modify your duplicate extension in Hyperspace, open the Extension editor (search: Extension).
10. Enter the name or ID of the duplicate extension you created in Chronicles.
11. Click Edit to make changes to the parameters.
12. To truncate the patients' names to show three letters of the last name and two letters of the first name, in the Value field for the Truncate parameter, type "3" and press Enter. In the same field, type "2" and press

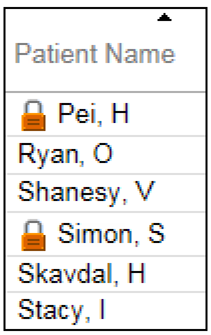
Enter.

13. By default, the patient name appears Last Name, First Name. If you want it to appear First Name Last Name, set the Name Order parameter to 1 or use the magnifying glass icon to select your preferred name order.
14. Save and exit your extension.
15. In Hyperspace, open the Column Editor (search: Column Editor).
16. In the Create New Column field, enter a name for your new column.
17. In the Copy from field, enter 17302-MR Multi Prov Schedule Patient name.
18. In the Text ext field, change the extension to your copy that you modified.
19. Click Accept.

For information about adding new columns to the Available Columns list for clinicians, refer to the Give Clinicians Access to Columns in Patient Lists topic.

Use a Lock Icon to Identify Confidential and Private Patients on Patient Lists

You can use a lock icon in patient name columns in the Patient Lists activity to identify both confidential patients and patients that have encounters marked as private.



Including the lock icon in the name column can make the status more visible to users, and it eliminates the need for a separate column to track these statuses, allowing more space for other columns. Because both confidential and private-encounter patients often require the same level of confidentiality, you can use the same icon for both of these patient populations.

Create a Confidential Patient Rule

Create a rule to find patients who have been identified as confidential or private during arrival or registration workflows.

1. In Hyperspace, open the Rule Editor:
    - Search: Rule Editor
    - Path: Epic button > Tools > Rule Editor Tools > Rule Editor
2. Create a new rule with a context of Patient. Name the rule something like Patient is Confidential or Encounter is Private.
3. Add rule property 2435-Confidential to your rule.
4. Enter = in the Operator field and enter 1 in the Value field. These settings make your rule return a value of 1 (true) if the patient is marked as confidential or the encounter is marked as private during registration.

5. Enter "1" in the Error message field. This value is returned by the rule if the patient is marked as confidential or the encounter is marked as private. Do not enter any other information in this field.

Create an Extension to Evaluate Your Confidential Patient Rule

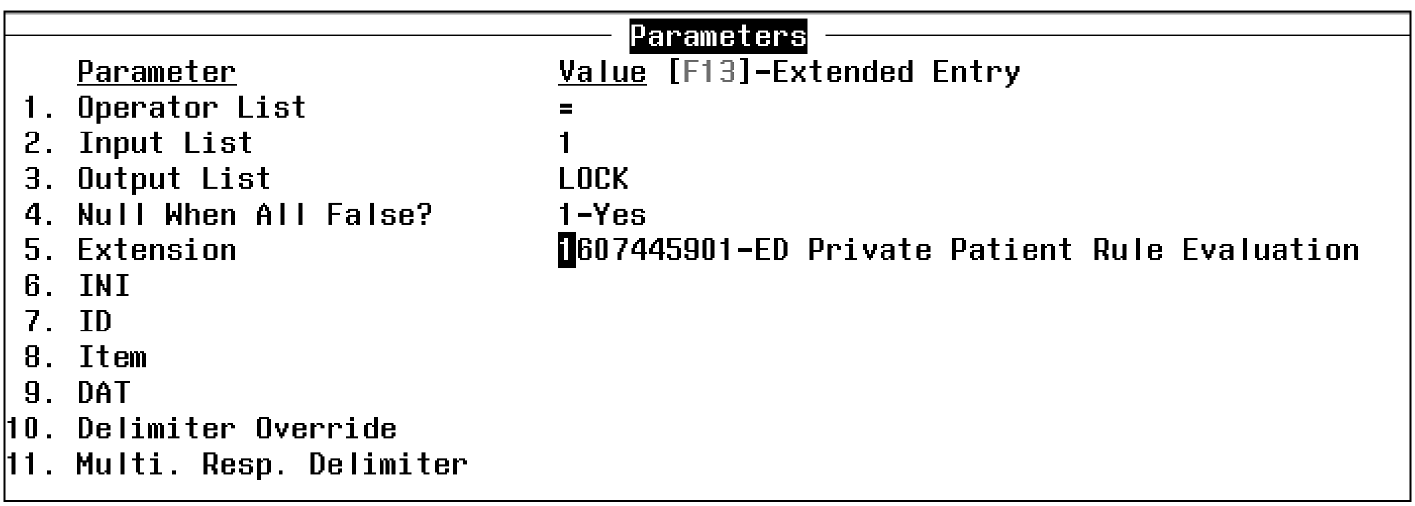
Create an extension to determine whether your confidential patient rule returns true for a patient.

1. In Chronicles, duplicate extension 74459-ADT RW EPT Rule Evaluation.
2. Open your copy and go to the Parameters screen.
3. Set the Rules parameter to the rule you created to find confidential patients and patients who have encounters marked as private.
4. Set the Default Message parameter to any value. This is the value that is returned if no rules are met. For example, set this parameter to 0.

Create an Extension to Show the Lock Icon for Confidential Patients

Create an extension that causes the lock icon to appear when your evaluation extension finds a patient for whom the confidential patient rule is true.

1. In Chronicles, duplicate extension 49491-ED Translation - Icon PAF.
2. Open your copy and go to the Parameters screen.
3. Set the Operator List parameter to =. This specifies the operator used for comparison.
4. Set the Input List parameter to 1. This is the value that triggers the Output List value to appear when it is found in the confidential patient rule.
5. Set the Output List parameter to LOCK. This specifies the icon to show.
6. Set the Null When All False? parameter to Yes. This sets the output value to null so no icon appears when the Input List parameter doesn't equal 1.
7. Set the Extension parameter to your copy of extension 74459. When that extension is called and it equals 1, this extension causes the lock icon to appear.



Add the Lock Icon Extension to a Patient Name Column

Add the lock icon extension to the patient list columns you want the lock icon to appear in, and make the columns available to your users.

If you added the lock extension icon to a column that is already listed here, no further setup is required. For more information about giving specific users access to report columns in the Patient Lists activity, refer to the Give Clinicians Access to Columns in Patient Lists topic.

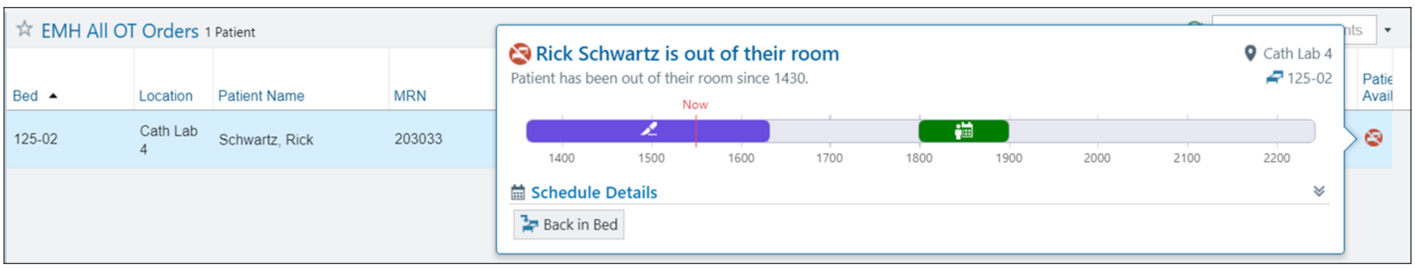
1. In Hyperspace, open the Column Editor:
   - Search: Column Editor
   - Path: Epic button > Tools > Column Editor
2. Open the report column that you use to show patient names in the Patient Lists activity. For example, open your copy of report column 85-Patient Name or report column 267-Patient Name (ADT).
3. In the Image Ext field, enter your copy of extension 49491.

If you added the lock icon extension to an existing column, no further setup is required. For more information about giving specific users access to report columns in the Patient Lists activity, refer to the Give Clinicians Access to Columns in Patient Lists topic.

Show Current Patient Availability in Patient Lists

Starting in May 2024

Let providers check a patient's availability so they can avoid rounding on busy patients by adding column 94709-Patient Availability with Today's Itinerary to Patient Lists. To configure the column and its hover bubble, refer to the Patient Availability Setup and Support Guide.



In the Foundation System

The Patient Availability column is included in the following system lists in the Foundation System:

- Epic Hospital:
  - 4400-Dialysis
  - 3416-Lactation
  - 400-Occupational Therapy
  - 100500-Physical Therapy
  - 290-Respiratory Therapy
  - 401-Speech Language Pathology
  - 1650000001-Transplant
  - 3058-Wound Care
- Epic Pediatric Hospital
  - 3215-Occupational Therapy
  - 3230-Physical Therapy
  - 3221-Respiratory Therapy
  - 3231-Speech Language Pathology
  - 3247-Transplant
  - 3089-Wound Care
- Inpatient Draw Lists
  - 1069-Epic Medical Hospital
  - 3258-Epic Pediatric Hospital

We recommend updating patient lists that show column 33099-Patient in Bed to show column 94709-Patient Availability with Today's Itinerary instead. To identify and update patient lists that include column 33099, refer to the following topics:

- Identify Patient List Records That Need Updates
- Update Many Patient Lists at the Same Time

To add the column to individual patient lists, refer to the following topics:

- Give Clinicians Access to Columns in Patient Lists
- Create a My List or Shared Patient List

Protect Confidential Patient Information Using a Break-the-Glass Column

You can use report column 34995-Generic Break the Glass in an inpatient setting to protect the information of patients who are in confidential departments. For example, you might use this feature to protect the names of patients in confidential departments. You can use this column to protect information in any report columns marked for use in Inpatient EMR. Note that users might need to refresh the screen after breaking the glass before they can see the patient's information.

To set up the column, you must make a copy of the column, configure a copy of its associated extension, configure the column, and give users access to it.

1. In Chronicles, enter PAF at the Database initials prompt to open the Report Columns master file.
2. Make a copy of report column 34995 and jot down the copy's ID.
3. In Chronicles, enter LPP at the Database initials prompt to open the Extension master file.
4. Make a copy of extension 87867-IP Break the Glass Column.
5. In the first parameter, enter the ID of the column you want to protect with Break-the-Glass. For example, you might enter the column your organization uses to show a patient's name.
6. Leave the second parameter set to its default value, 100-Clinical.
7. In Hyperspace, go to the Column Editor (search: Column Editor) and open your copy of column 34995.
8. In the Text Ext (I PAF 60) field, enter your copy of extension 87867.

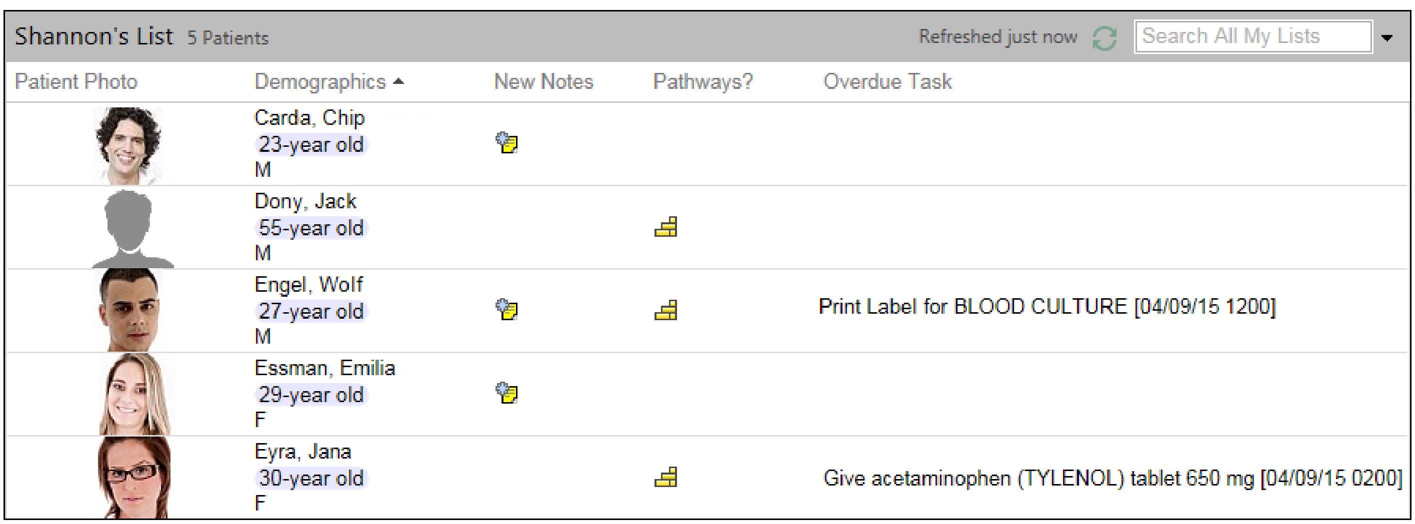
To add the column to a patient list, refer to the following topics:

- Give Clinicians Access to Columns in Patient Lists
- Create a My List or Shared Patient List

To add the column to a report, refer to the Determine Which Columns Appear in a Report topic.

Add Patient Photos to a Patient List

A picture is worth a thousand words when a clinician can walk into a patient's room and instantly recognize the person she is treating. That recognition not only provides an extra layer of safety, but it might also make your patients feel more welcome. Report column 34395-Patient Photo retrieves and shows the photos stored on your Web BLOB server. When no photo is on file, or when access to a patient is restricted, a blank silhouette appears instead.



> **!** To add patient photos to patient lists, you must be using a Web BLOB server for image storage. Refer to the Display Patient Photos in Demographic Activities topic for detailed information and setup instructions if your organization is not already using patient photos in other parts of the hospital chart.

To add a patient's photo to a patient list, you need to have a picture of the patient stored on the Web BLOB server and the patient list must be using report column 34395 or a copy. If your organization already uses patient photos in other parts of the chart, such as the patient header, column 34395 will show the photos of patients already in your system. Additional patient photos can be added using the Demographics activity.

Add a Patient Photo from the Demographics Activity

1. In Hyperspace, go the Demographics activity.
2. On the Contact Information tab, click Set Photo. The Acquire New Photo window appears.
3. Click Acquire. If there are multiple devices attached to the workstation, you are prompted to select a device.
4. Select the webcam and click Select. The steps that follow might vary slightly based on the webcam and drivers you are using.
5. The video should appear in a window on your screen. When you are happy with the patient's position, click Capture. This takes a photo and stores it temporarily.
6. To save the photo, select it and click Get Pictures. The photo appears on the Contact Information tab and anywhere else you have configured patient photos to appear in your system, such as the patient header.

Add Column 34395 to Patient Lists

Determine whether you want to add column 34395 to:

- An individual patient list. Refer to the Create a My List or Shared Patient List topic.
- A My List template. Refer to the Use Templates to Generate My Lists for Users Automatically topic.

Alternatively, you can give users the ability to add this column to their own patient lists from the My List Editor. Refer to the Give Clinicians Access to Columns in Patient Lists topic. Note that users cannot sort on column 34395.

Show a Patient's Age in Hours

To show clinicians working with newborns specific information about their patients' ages, you can configure the following columns and their extension records to show the patient's age in hours:

- Report column 17304-MR Multi Prov Schedule Patient Age, which uses extension record 13304-MR Multi Prov Schedule - Patient Age
- Report column 34001-IP Patient's Age, which uses extension record 34001-IP Calculated Age
- Report column 34200-EC Patient Age and Sex, which uses extension record 34200-EC Patient Age and Sex
- Report column 34204-IP Patient Name Age and Sex, which uses extension record 34203-IP Patient Name Age Sex

Configure the display age and extension records for patient age columns:

1. In Clinical Administration, go to Management Options > Edit System Definitions (LSD) > Age, Height, Weight.
2. On the Unit Display and Entry screen, enter the minimum age you want to appear in days in the Display age in days as of field. For example, if you want patients' ages to appear in hours until they're two days old, enter 2. The default age is 0.
3. In Chronicles, duplicate the extension record of the column you want to configure.
4. Edit your copy of the extension record.
   - For extension records 13304, 34001, and 34204, set the second parameter to 1.

- For extension record 34200, set the first parameter to 1.

5. In Hyperspace, follow the path Epic button > Tools > Column Editor.
6. On the Create New Column tab, enter a name for your new column.
7. In the Copy from field, enter the column you want to copy.
8. In the Text Ext field, enter your copy of the extension record.
9. Click Accept.

For information about adding new columns to the Available Columns list for clinicians, refer to the Give Clinicians Access to Columns in Patient Lists topic. For information about adding columns to a My List or system list, refer to the Create a My List or Shared Patient List and Create a System List topics. For information about using these columns in Reporting Workbench reports, refer to the Determine Which Columns Appear in a Report topic.

Show the Fill Status of a Discharge Prescription

To show the fill status of patients' discharge prescriptions in integrated ambulatory pharmacies, you can add column 84177-Rx Patient Discharge Prescription Information to patient lists. Column 84177 uses extension 84320-Rx Discharge Prescription Status - New Icons and allows nurses to bypass calling the pharmacy to check in on the status of their patients' prescriptions.

Column 84177 can show the following icons:

- Fill in Progress: A mortar and pestle appear when at least one prescription is in the process of being filled, and none of the prescriptions being processed is for a controlled medication.
- Fill in Progress - Controlled: A mortar and pestle with a lock over them appear when at least one prescription is in the process of being filled, and at least one of the prescriptions is for a controlled medication.
- Ready for Pick Up: A bag appears when all fills have reached the status of Ready to Dispense, and none of the prescriptions is for a controlled medication.
- Ready for Pick Up - Controlled: A bag with a lock over it appears when all fills have reached the status of Ready to Dispense, and at least one of the prescriptions is for a controlled medication.
- Picked Up: A check mark appears when all fills have reached the Dispensed status, and none of the prescriptions is for a controlled medication.
- Picked Up - Controlled: A check mark with a lock over it appears when all fills have reached the status of Dispensed, and at least one of the prescriptions is for a controlled medication.
- Blank: If there are no icons in the column, there are no prescriptions that fall into one of the above categories.

MRN	Patient Name	Sex	Age	Unit	Discharge Rx
118037	Doe , Richard	M	29-year old	PAM ICU	
214546	Smith , Jane	F	64-year old	PAM PSYCH UNIT	
160354	Moglow , John	M	44-year old	PAM MED SURG	
214544	Millburg , James	M	24-year old	PAM MED SURG	
214545	Wilson , Evangeline	F	64-year old	PAM ED	

To customize a column to search for prescriptions from certain pharmacies, perform the following steps:

1. Make a copy of extension 84320-Rx Discharge Prescription Status - New Icons.

2. In Chronicles, access the Extension (LPP) master file. Follow the path Enter Data > Edit Extension and open your copy of the extension.
3. Go to the Parameters screen.
4. Enter the number of hours that the system should look back for dispensed fills in the Lookback hours for dispensed fill parameter. The default behavior is for the system to look back 12 hours.
5. With the Restrict to Pharmacies parameter selected, press F6, which takes you to the Parameter Information screen.
6. In the Values field under the List heading, enter the pharmacy IDs corresponding to the pharmacies you want the column to consider when evaluating prescriptions. If this parameter is left blank, all pharmacies are considered.
7. Go to the Column Editor in Hyperspace (search: Column Editor) and search for the column you've chosen to use. Make a copy of this column and open it.
8. Enter your copy of the extension in the Image Ext. field.
9. Change the caption to differentiate your customized column from the released column.

To add either your customized column or the column as released to the Patient Lists activity, refer to the Create a My List or Shared Patient List and Create a System List topics.

Show How Long a Patient Has Been Bedded in Their Current Unit

To give clinicians an up-to-date counter for how long a patient has been bedded in their current unit, you can add report column 35611-Inpatient Department Length of Stay to patient lists. Starting in August 2021, you can also use report columns 36185-Inpatient Department Arrival Instant and 36186-Inpatient Department Arrival Date to show the date when a patient arrived at a department. To do so, you'll need to decide how the system should treat patients who are temporarily transferred to other units. We recommend using system-wide settings to keep this logic consistent, because it is also used for all of the following:

- Copies of report columns 35611-Inpatient Department Length of Stay, 36185-Inpatient Department Arrival Instant, and 36186-Inpatient Department Arrival Date you add to other locations in Hyperspace, such as Storyboard, the Unit Manager, the Epic Monitor, and Reporting Workbench reports.
- Rule properties 42520-Department Length of Stay, 42522-Department Arrival Instant, and 42523-Department Arrival Date.
- SmartLink 34501-Inpatient Department Length of Stay (mnemonic: .IPDEPLOS).

If you plan to use this real-time information in other locations in Hyperspace besides patient lists, work with your Storyboard, Grand Central, or reporting teams as needed to complete the system-wide setup. If you need to treat temporary transfers differently in different situations, you can override the system-wide settings by changing the parameters in individual copies of the report column, rule property, or SmartLink.

System-Wide Setup: Decide Which Transfers Should Reset the Patient's Length of Stay in a Unit

The system calculates how long a patient has been bedded in the current unit in the following ways:

- The calculated length of stay is based on transfers only. Patient Location (PLC) updates without a transfer to another unit don't reset the length of stay.
- If a patient takes a leave of absence and then returns to the same unit, their length of stay in that unit is

not reset. The calculated length of stay includes the leave of absence.

Your organization has two decisions to make:

- What should happen when a patient is transferred to a perioperative unit, then back to the original unit? By default, this is treated like a leave of absence during one continuous stay. However, you can choose to reset the length of stay when the patient returns to the original unit. Note that a perioperative unit is any department that has the Is Perioperative Department (I DEP 6110) item set to Yes. This generally includes pre-operative areas, the OR, and the PACU.
- Are there other kinds of temporary transfers that shouldn't reset the patient's length of stay in their original unit? For example, if patients are often temporarily transferred to a specialty unit for dialysis while the bed in their original unit is held for them, you can make the dialysis unit an exception and count this as a single stay in the original unit. Note that these exceptions are based on the department's specialty as set in the Specialty (I DEP 110) item, so they apply to all departments that share that specialty.

After you have made these decisions, configure the system-wide settings:

1. In Clinical Administration, follow the path Quality, Reporting Measures > Hospital Quality Measures > Hospital Quality Measures > Edit Quality Measure Configuration > Other Measures > Other Inpatient Configuration.
2. Go to the Other Inpatient Configuration - 1 screen.
3. If you want to reset the length of stay when a patient is transferred to a perioperative unit, then back to the original unit, enter Yes in the Reset LoS in perioperative departments? (I HFR 40600) field.
4. If temporary transfers to certain other units shouldn't reset the patient's length of stay in their original unit, enter the specialties of these exceptions in the Specialties that do not reset LoS (I HFR 46005) field.

Customize Individual Columns

If you want different patient lists to handle temporary transfers differently, you can override the two system-wide settings described above in individual copies of the report column. To do so:

1. In Chronicles, access the Extension (LPP) master file.
2. Duplicate extension 36105-Department Length of Stay if you want to show the patient’s length of stay, 36185-Department Arrival Instant if you want to show the date and time the patient arrived, or 36186-Department Arrival Date if you want to show only the date the patient arrived. Extensions 36185 and 36186 are available starting in August 2021.
3. Open your copy of the extension and go to the Parameters screen.
4. If you want to reset the length of stay when a patient is transferred to a perioperative unit, then back to the original unit, enter Yes in the Reset LoS in perioperative departments? parameter.
5. If temporary transfers to certain other units shouldn't reset the patient's length of stay in their original unit, enter the specialties of these exceptions in the Specialties that do not reset LoS parameter.
6. In Hyperspace, open the Column Editor (search: Column Editor).
7. Select Create new column. Enter a column name and ID number, keeping in mind your organization's naming conventions.
8. In the Copy from field, enter report column 35611-Inpatient Department Length of Stay if you want to show the patient’s length of stay, report column 36185-Department Arrival Instant if you want to show the date and time the patient arrived, or report column 36186-Department Arrival Date if you want to show only the date the patient arrived. Report columns 36185 and 36186 are available starting in August 2021.
9. Click Accept. The Column Editor opens.

10. In the Text Ext field, enter the copy of the extension you created.
11. Make this new column available to clinicians by following the steps in the Give Clinicians Access to Columns in Patient Lists topic.

Determine How Often System Lists Refresh

You can set system lists to refresh every so often. This helps to ensure that a clinician viewing a system list is looking at an accurate record of patients who belong on that list. The refresh interval of a system list is determined by its system list type. Epic recommends a refresh interval of 15 minutes.

1. In Hyperspace, open the Patient Lists activity.
2. Right-click the system list type that contains the system list for which you want to define the refresh interval. Select Properties from the menu that appears. The Properties window appears.
3. Click the Advanced tab. Enter a time in minutes in the Refresh Interval (in minutes) field. Click Accept.

Use Templates to Generate My Lists for Users Automatically

You can help ensure that all users have My Lists with the columns and shortcuts they need by configuring profiles to generate one or more My Lists for every user who does not yet have any My Lists. Users can still build and customize their own My Lists, but creating My List templates can help reduce the number of My Lists they might need to create. These templates are also available to users from the My List Editor to copy from whenever they create their own My Lists.

You can make certain columns required, so that the My Lists always contain columns with the information you want them to see, such as patient names or allergies. Users can add and remove columns from My Lists generated from My List templates, but they cannot remove any columns that you have made required in the My List template. You can also designate a default sorting column in a My List template. When you do so, all My Lists generated from that template are sorted based on the specified column by default.

To create My List templates from scratch, you should use the My List Template Editor in Hyperspace. If you plan to copy existing lists to create your My List templates, you can use either the My List Template Editor or a utility in Clinical Administration. The utility allows you to quickly select required columns, attach system lists, and add the template to a profile. You can also use an import specification to create several My List templates at the same time.

Only users with Inpatient security point 1-Patient List Administrator or MR security point 109-Patient List Administrator can create My List templates.

> Note that you can also use My List templates to help manage your users' My Lists and replace multiple individual columns with a column block. When you update a My List template, any existing My Lists are updated to first show all of the columns from the updated template and then show any columns a user has added. This allows you to send users a new My List format without overwriting any individual columns that users might have added to their My Lists. To replace the My List template used by existing users with a new one, refer to the Update Users' Existing My Lists with a Utility topic.

Create My List Templates Using the Editor

1. In Hyperspace, open the Patient Lists activity and click the arrow next to the Edit List button.
2. Select Manage My List Template from the menu that appears.
3. In the Patient List Select window, click the Create tab and enter a name for your My List template, keeping in mind your organization's naming conventions. The My List Template Editor appears.
4. Add a column or column block to your template by selecting a column or column block from the Available Columns table and clicking Add. The column or column block is removed from the Available Columns table and appears in the Selected Columns table.
5. To copy the layout of an existing patient list instead of rebuilding the layout from scratch:
   a. Click Copy. The Choose columns window appears.
   b. Select a My List template or another patient list. The columns and layout of the selected template or list appear in the Selected Columns table.
6. Rearrange columns or column blocks in the Selected Columns table by selecting the element you want to move and clicking the up or down arrow button.
7. Remove columns or columns blocks in the Selected Columns table by selecting the element you want to remove and clicking Remove.
8. To require a column or column block in My Lists associated with this My List template, select the Required check box next to that element in the Selected Columns table.
9. In the Column to sort by (I ERS 34015) field, enter a default column by which to sort the list. The default column can be chosen from the list of currently selected columns. If no default column is selected, the patient list sorts on the first column in the list by default. Patient photo columns cannot be used to sort the list.
   - You can choose whether the column sorts in an ascending or descending direction by selecting one of the buttons next to the Column to sort by field.
10. Go to the Advanced tab of the My List Template Editor.
11. In the Default Report field, enter the report you want to open in the Report pane when a user selects a patient.
12. In the Refresh Interval (in minutes) field, enter the number of minutes that indicates how often you want this set of My Lists to refresh. If you don't enter a time here, the refresh time is dictated by system definitions.
13. In the System Lists to Attach to My List column, enter the names of the system lists you want included on the template. Click Accept.
14. Create as many new My List templates as you want to add to the user's profile.
15. In Clinical Administration, follow the path Management Options > Profiles > Patient List, using the profile for which you want to set up automatic patient lists.
16. On the Patient Lists and Folders screen, enter the names of the templates you created in the My List auto-creation templates (I LPR 34530) field.

Create My List Templates Using a Utility

1. In Clinical Administration, follow the path Management Options > Utilities > Clinical Utilities > Miscellaneous Clinical > Create My List Template from ERS.
2. Enter the name or record ID of the patient list you want to copy from. If you want to create more than one

template at a time, you can enter multiple patient lists at the Patient Lists prompt.

3. At the Options for the PAF columns in the Template prompt, choose:
   - 1 - Required (All): Make all of the columns from the list you selected required in the template. Users cannot remove them from My Lists they create from this template.
   - 2 - Optional (All): Make all of the columns from the list you selected optional in the template. Users can remove them from My Lists they create from this template.
   - 3 - Prompt for each column: Review each column from the list you selected to determine whether it should be required or optional on a case-by-case basis.
4. Enter an ID or let the system assign an ID for the My List Template by entering * at the prompt.
5. Enter a name for your My List Template that will appear to users in the My List Editor.
6. If you want to attach any system lists to your My List Template, enter Yes at the prompt and enter the name of the system lists.
7. To add the My List Template to a profile, enter Yes at the prompt and enter the name or ID of the profile or profiles you want to add the template to.
8. If you are creating more than one My List template, the prompts for the next My List appear.

Create My List Templates Using an Import

If you want to import multiple My List templates rather than manually creating each one, you can use an import specification ERS,1060-Mylist Creation Template. For example, this import is useful when you first implement My List templates because you'll have several My List templates to create at one time.

When you import My List templates that include column blocks (I ERS 34050), there are a few things to keep in mind:

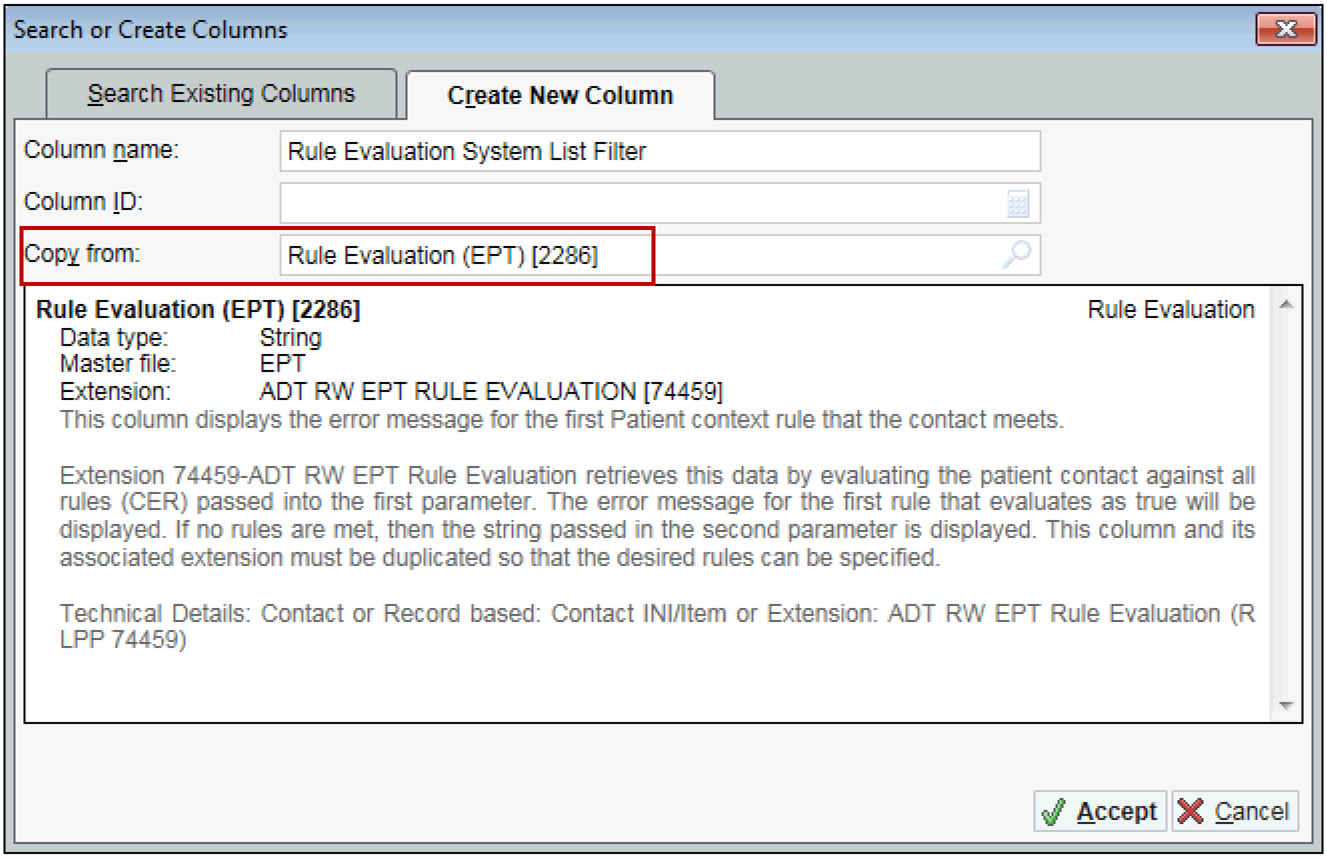
- You need to enter the columns (I ERS 34002) included in those column blocks in the same order in the import spreadsheet in which they are listed in the column block (FBL) record.
- All of the columns you enter for a given column block must have the same Column Requirement Status (I ERS 34044) as each other, either Required or Optional.
- The Column Block item (I ERS 34050) needs to be set for each line of the column block.

For more information about importing records, refer to the Standard Import Guide.

Create Filters for System Lists

You can create filters that narrow down the contents of a system list. These filters are available in the list of Available Filter Items on the Filters tab of the System Lists Editor. You create filters in the Column Editor.

1. In Hyperspace, go to the Column Editor:
   - Search: Column Editor
   - Path: Epic button > Tools > Column Editor
2. Select Create new column. Enter a name for your filter and an ID, keeping in mind your organization's naming conventions.
3. If you want to copy from an existing filter or patient list column, enter its ID in the Copy from field.



4. Click Accept. The Column Editor opens.
5. In the Field type field, select a type of filter.
   - To filter on information from a master file, select Data Item.
   - To filter on information from an extension, select Extension or Display and Filter Extension.
6. In the Field scope field, select a field scope:
   - Both Filter and Displayable. You can use this record as a column or as a filter.
   - Filter Only. You can use this record only as a filter.
7. In the Master file field, enter the master file you want the filter to search.
   For example, if you want to filter a system list on data found in the Generic Patient Database (EPT) master file, enter EPT.
8. If you selected a field type of Data Item, enter the item of the master file you want the filter to search in the Item field.
   For example, if you want to filter a system list on a patient's expected discharge date, enter 10303-Expected Discharge Date.
9. If you selected a field type of Extension or Display and Filter Extension, enter the extension you want to filter on in the Text Ext field.
   For example, if you want to filter a system list on the members of a treatment team, enter 49529-ED TT Members.
10. In the Used by field, enter Inpatient EMR.
11. Make any other customizations as necessary.

For information on adding filters to a system list, refer to the Create a System List topic.

Rebuild System Lists After Changing Filters

Epic provides two utilities that rebuild system lists:

- Rebuild Orders System Lists
- Rebuild Treatment Team System Lists

You should use the Rebuild Orders System Lists utility when you make changes to the criteria for orders-based system lists in System Definitions. In addition, these utilities can be useful resolving problems with patients incorrectly appearing on orders- or treatment team-based system lists.

To access these utilities in Clinical Administration, select the utility for the type of system list you want to rebuild and follow the path:

- Rebuild Orders System Lists: Management Options > Utilities > Application Utilities > Orders.
  - In May 2024 and earlier, follow this path: Management Options > Utilities > Orders.
- Rebuild Treatment Team System Lists: Management Options > Utilities > Clinical Utilities > Miscellaneous Clinical.

Filter System Lists Based on Treatment Team Assignments

You can filter system lists to show only patients who have a specified provider in a specified treatment team role. This is useful if you have providers who fill multiple roles at your organization. For example, if a provider works both as a respiratory therapist and as a nurse practitioner, you can create separate lists for each role.

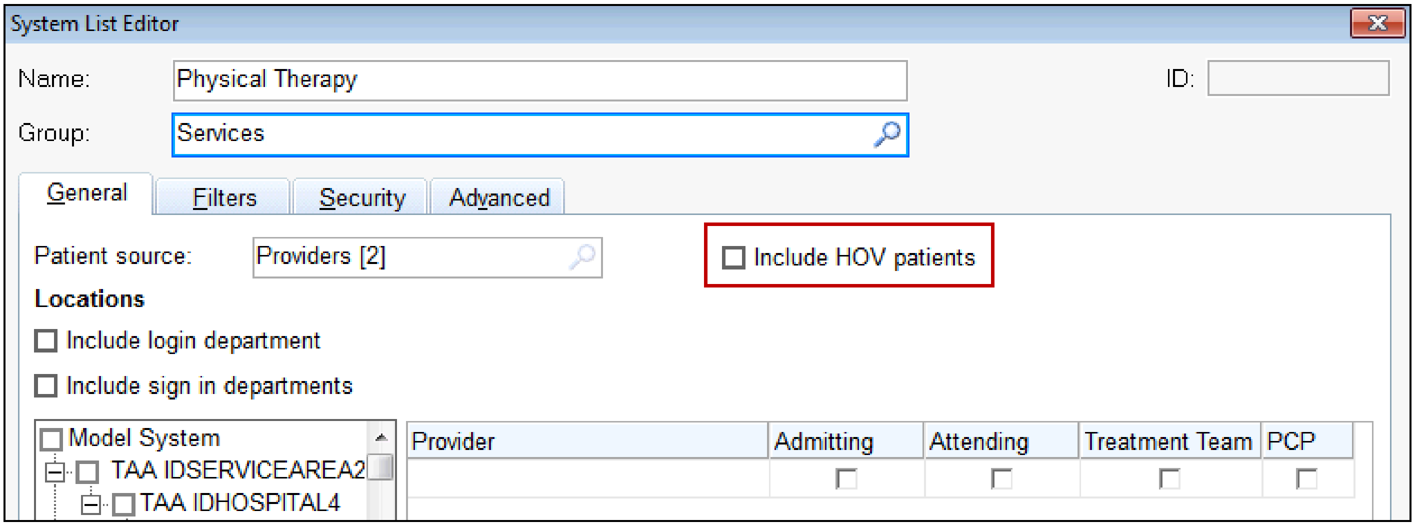
1. In Chronicles, access the Extension (LPP) master file and duplicate extension record 88099.
2. Configure the following parameters of your duplicate record as desired:
   a. Providers. Enter one or more providers to show only patients who have one of those providers on their treatment teams. If left blank, patients for all providers are shown.
   b. Tx Team Roles. Enter one or more roles from the Treatment Team Relationship to Patient (I EPT 18869) category list to show only patients who have one of the specified providers in one of the specified treatment team roles. If left blank, all roles are included.
   c. Include Current Provider. Enter 1-Yes to include patients for whom the provider currently logged in to Hyperspace is on the treatment team in one of the specified roles. If left blank, these patients are not included.
   d. In Hyperspace, go to the Column Editor:
      - Search: Column Editor
      - Path: Epic button > Tools > Column Editor
3. Copy column 33037.
4. In your copy, enter the extension record from step 2 in the Text Ext field.
5. Go to the Patient Lists activity and create a new system list.
6. Select one or more departments to show patients from.
7. On the Filters tab, select your column.
8. Click Include Values and enter a value of 1.

Show HOV Patients on a Treatment-Team Based System List

You can include patients scheduled with hospital outpatient visit (HOV) departments on treatment team-based system lists. For clinicians who regularly see HOV patients, such as physical therapists, including these patients on a system list helps the clinicians more easily find the patients they are assigned to and access their records.

HOV patients appear on the system list after an HOV encounter is created and the provider's treatment team assignment becomes active. The HOV patient is removed from the system list when the encounter is closed or when the provider is no longer an active member of the treatment team, whichever comes first.

When you create a system list, an Include HOV patients check box appears whenever Providers is entered in the Patient source field. Select that check box to include HOV patients on the system list.



Configure a Shared List So that Clinicians Other Than the Owner Can See the Owner's Patients

You can configure a shared list to show the patients to whom the owner of the shared list is assigned regardless of who views the list. This is useful when one clinician needs to care for another clinician's patients, for example, when a hospitalist is out of office and another hospitalist needs to cover their consults.

Create a shared list by completing the relevant steps in the Create a My List or Shared Patient List topic.

Create and edit a copy of extension 88099-IP Filter Treatment Team by Provider and Role:

1. In Chronicles, access the Extension (LPP) master file.
2. Duplicate extension 88099-IP Filter Treatment Team by Provider and Role.
3. Set the fourth parameter, Use List Owner? to Yes. When you enter Yes, patients to whom the list owner is assigned appear on the shared list regardless of who views it.

Create a filter and link your extension to the filter:

1. In Hyperspace, open the Column Editor (search: Column Editor).
2. Duplicate report column 33037-IP Filter Treatment Team by Provider.
3. In your copy, change the value in the Caption field so it's different from the caption of the column you copied.
4. In the Text Ext field, enter your copy of extension 88099.

Create a system list and link your filter:

1. In Hyperspace, open Patient Lists.
2. On the activity toolbar, click the arrow next to Edit List. Select Create System List.
3. Enter a name in the Name field.
4. In the Group field, select the system list grouper under which you want this system list to appear in the Directory pane.
5. In the Patient source field, enter Providers.
6. In the Provider field, enter Self and select the Treatment Team check box.
7. Go to the Filters tab.
8. In the Available Filter Items list, select the Filter you created and click Include Values.
9. Enter 1 in the List return values to include field and click Accept.

Create a Shortcut to the System List:

1. Right-click your system list.
2. Select Send To and select the shared list you created.

Exclude Expired Orders from Patient List Columns

To give clinicians more useful and actionable order information, you can filter expired orders from patient list columns. To do so, use copies of extension 3980-IP Order Display Filter along with report column 3980-Filtered Med/Proc to show a patient's active orders in the patient header or patient list columns, and use the eleventh parameter of extension 3980 to exclude expired orders.

1. In Chronicles, access the Extension (LPP) master file.
2. Duplicate extension 3980.
3. Set the eleventh parameter, Hide Expired Procedures?, to Yes.
4. In Hyperspace, open the Column Editor (search: Column Editor).
5. Duplicate report column 3980-Filtered Med/Proc or open your existing copy.
6. In the Text Ext field, enter your new copy of extension 3980.
7. If you duplicated report column 3980, open your clinicians' profile record and add your copy of report column 3980 to the Available columns field on the Patient List Columns screen.

Exclude Patients with Expired Orders from Orders-Based System Lists

To give clinicians more useful and actionable orders-based system lists, you can filter out patients whose orders are expired. For example, if nurse managers at your organization perform additional review for patients in restraints, you might want to exclude any patients whose order for restraints is expired. To do this, you configure a copy report column 3980-Filtered Med/Proc to act as a system list filter, using a copy of extension 3980-IP Order Display Filter.

1. In Chronicles, access the Extension (LPP) master file.
2. Duplicate extension 3980.
3. In the System list filter parameter, press F6 to edit the value, and enter a system list filter. System list filters are listed in the Filter Value (I LSD 34804) field in EMR System Definitions. To create a new system list filter, refer to the Add Patients with Certain Orders to Lists Automatically topic.

4. In the Hide Expired Procedures? parameter, enter Yes.
5. In Hyperspace, open the Column Editor (search: Column Editor).
6. Duplicate report column 3980 or open your existing copy.
7. In the Field scope (I PAF 110) field, enter Both Filter and Displayable.
8. In the Text Ext (I PAF 60) field, enter your new copy of extension 3980.
9. If you duplicated report column 3980, open your clinicians' profile record and add your copy of report column 3980 to the Available columns (I LPR 34500) field on the Patient List Columns screen.
10. Go the Patient Lists activity.
11. Right-click the system list you want to update and select Properties to open the System List Editor.
12. Go to the Filters tab.
13. Add your copy of column 3980 to your list by selecting it in the Available Filter Items section and clicking Exclude Values.
14. Select the "Exclude cases with empty return value" check box and click Accept.

Prioritize Patients by Their Oldest Order on Orders-Based System Lists

By default, report column 20195-Age of Order shows the age of the most recent order that puts the patient on the orders-based system list. If you use this column to prioritize patients who are due for a consult or follow-up, you can use the age of the oldest order instead, so that the patient isn't bumped further down the list if a clinician later places a duplicate order:

1. In Chronicles, access the Extension (LPP) master file.
2. Duplicate extension 14016-Age of Order.
3. Set the fifth parameter, Use Oldest?, to Yes.
4. In Hyperspace, open the Column Editor (Epic button > Report Management > Reporting Workbench > Column Editor).
5. Duplicate report column 20195-Age of Order or open your existing copy.
6. In the Text Ext field, enter your new copy of extension 14016.
7. If you duplicated report column 20195, make this new column available to clinicians by following the steps in the Give Clinicians Access to Columns in Patient Lists topic.

Show Clinicians Order Context Return Messages in an Order System List

Starting in November 2025

If you want to show clinicians medication or procedure order information, like the provider team assigned to a consult order or the medication order status for inpatient pharmacists, you can use an order system list column so clinicians do not need to open the patient’s chart for this information. Additionally, you can use this column with multiple orders in multiple lists using different system list filters. For example, you might build a rule that evaluates whether the order is an active consult order, show the return message of the provider team on a consult order, and a system list column to help clear confusion about which consulting physicians are assigned to patients without opening the patient chart.

To configure an order system list column that uses an order context rule:

1. In Hyperspace, open the Rule Editor and create a new order context rule.
2. Enter the return message into the rule into the return message field. For more information about creating rules, refer to the Create or Edit a Rule topic.
3. In Chronicles, open the Extension (LPP) master file.
4. Follow the path Enter Data > Duplicate Extension and duplicate extension 36746-Patient List Order Return Message.
5. Open your copy of extension 36746.
6. Go to the Parameters screen and configure the following parameters:
    a. 1-Rules to Evaluate. Required. Enter the order context rules you created in step 1.
    b. 2-Default Message. Optional. Enter the message that appears by default if none of the rules return true. If you leave this parameter blank, a message does not appear if all rules evaluate false.
    c. 3-Return Message Delimiter. Optional. Enter a delimiter to use between values or lines when multiple values or lines are returned. If you leave this parameter blank, Comma + Space (,) is used.
    d. 4-Orders to Evaluate. Optional. To determine which orders that meet the system list filters are evaluated, enter one of the following:
        - 2-All to evaluate all orders.
        - 1-Oldest to only evaluate the oldest order. If there are multiple orders placed at the same instant and they meet the system list filter, all orders from that instant are evaluated.
        - 0-Newest or leave this parameter blank to only evaluate the newest order. If there are multiple orders placed at the same instant that meet the system list filter, all orders from that instant are evaluated.
7. In Hyperspace, open the Column Editor and create a new column.
8. Open the column you created and configure the following:
    a. In the Field type field, enter Extension.
    b. In the Master file field, enter EPT-Generic Patient Database.
    c. In the Text ext. field, enter your copy of extension 36746-Patient List Order Return Message.
    d. In the Used By field, add Inpatient EMR.
    e. Accept your changes.
9. In Hyperspace, go to Patient Lists and select the system list folder or MyList that has the correct order system list.
10. Go to Edit List > Properties and add your new column to the Selected Columns table.

Prevent the Width of Patient List Columns from Automatically Adjusting

By default, columns in the Patient Lists activity automatically adjust to fit the width of users' screens and users can't make columns smaller than 50 pixels. Users can adjust the width of columns manually, but the columns must always fill the screen width. For example, if a user decreases the size of column A, column B is automatically enlarged to fill the remaining space. If there are too many columns to fit on the screen, all columns are automatically resized to the minimum width of 50 pixels to fit as many on the screen as possible. With a profile setting, you can prevent columns from automatically shrinking to fit on a user's screen and give users the ability to make columns as small as 15 pixels.

1. In Clinical Administration, follow the path Management Options > Profiles (LPR) and open a profile.
2. Select Patient List and go to the Patient List Columns screen.
3. In the Enable patient lists autofit? field, enter No.

Open Chart Review for a Patient's Current Encounter from Patient Lists

Starting in August 2021

You can add a button to your patient list toolbar or tray to open Chart Review for the selected patient's current encounter. For example, clinicians might want this button available to jump into the patient's chart and review previous encounters for a newly admitted patient.

With this option, if a clinician clicks to open Chart Review for a patient who is not currently admitted, the Chart Review button still opens the chart of that patient, but not in a specific encounter.

To add this button to a toolbar or tray:

1. In Hyperspace, open the role you want to add the button for (search: Role Editor).
2. Under Menu Information, in the Menu to Extend (I E2R 40) field, enter the descriptor for the Patient list toolbar you want to add the button to, such as IP_MT_PATLIST.
3. In the Menu Descriptor field, add IP_IT_CHART_REVIEW.

Review Results for a Patient's Current Encounter from Patient Lists

Starting in August 2021

You can add a button to your patient list toolbar or tray to open Results Review for the selected patient's current encounter. For example, inpatient nurses might want this button available to quickly review current Glucose results for an admitted patient before administering insulin.

With this option, if a clinician clicks to open Results Review for a patient who is not currently admitted, they are prompted to select an encounter.

To add this button to a toolbar or tray:

1. In Hyperspace, open the role you want to add the button for (search: Role Editor).
2. Under Menu Information, in the Menu to Extend (I E2R 40) field, enter the descriptor for the Patient list toolbar you want to add the button to, such as IP_MT_PATLIST.
3. In the 'Menu Descriptor' field, add IP_IT_RESULTS_REVIEW.

Document Flowsheet Information from the Patient Lists Activity

Clinicians can document flowsheet data, such as patient vitals, directly from other activities in Hyperspace, such as the Patient Lists activity and the Track Board. This allows clinicians to document on their patients without having to open a chart or navigate between activities. For example, a clinician in the Patient Lists activity can open a window of flowsheet rows by clicking the Quick Doc button in the toolbar.

Document from a Menu Button

This topic explains how to create a menu button for documenting flowsheet information and make that button available to users.

Create and Configure an Activity and Menu Record

1. In Chronicles, open the Activity (E2N) master file and duplicate an activity record:
    - If you want your button to point to a SmartForm, duplicate activity 49855-ER_FLOWSHEET_POPUP.
    - If you want your button to point to a flowsheet template, duplicate activity 34053-IP_FLOWSHEET_POPUP.
2. In your duplicate activity record, configure parameters to determine which record the button points to and the appearance of the window that is opened:
    a. If you duplicated activity 49855-ER_FLOWSHEET_POPUP change the following parameters in the Control init parameters field on the General Information screen. Note that you must configure one of the first two parameters, but not both:
        - LQFID. Set this to the ID of a flowsheet SmartForm (for a static SmartForm).
        - FLTID. Set this to the ID of a flowsheet template (for a dynamic SmartForm or flowsheet template).
        - HEIGHT. The height of the Flowsheet window in twips (1/20th of a point). Modify this setting only if you need to change the height of the window because of your monitor settings.
        - WIDTH. The width of the Flowsheet window in twips (1/20th of a point). Modify this setting only if you need to change the width of the window because of your monitor settings.
        - ROWSONELINE. Enter 1 to display one row on each line in the Flowsheet window. Otherwise, two rows appear on each line when possible. This parameter applies only if you entered a flowsheet template and not a flowsheet SmartForm.

    b. If you duplicated activity 34053-IP_FLOWSHEET_POPUP, go to the Control Initialization Parameters screen and configure the parameters. You must enter a flowsheet template in the Flowsheet Template ID field, but other parameters are optional. Refer to the help text for information about the other options.
3. Switch databases and enter E2U at the Database Initials prompt to open the Menu master file.
4. Duplicate one of the following menu records, depending on which application you're creating this function for.
    - For EpicCare Inpatient or ASAP, duplicate 49855-ER_IT_FLOWSHEET_POPUP.
    - For EpicCare Ambulatory, duplicate 49857-DL_ER_IT_FLOWSHEET_POPUP.
5. Edit your duplicate menu record in Chronicles.
    - In the Menu Group (I E2U 220) field, enter the appropriate menu group to determine how the menu is enabled:
        - To make the menu always enabled, enter IP_PATLIST_ALWAYS.
        - To enable the menu if a My List or Shared List is selected, enter IP_PATLIST_LIST.

        - To enable the menu if one or more patients are selected, enter IP_PATLIST_NOT_EMPTY.
        - To enable the menu if there is at least one patient in the list, enter IP_PATLIST_LIST_NOT_EMPTY.
        - To enable the menu if a single patient is selected, enter IP_PATLIST_PT.
        - To enable the menu if a system list is selected, enter IP_PATLIST__SYS.
    - For EpicCare Inpatient or ASAP, enter the descriptor of your duplicate activity record in the Activity descriptor field on the Menu Information screen.
    - For EpicCare Ambulatory, enter the descriptor of your duplicate activity record in the Run parameters field on the Menu Information screen.

Make the Menu You Created Available to Users

Complete these steps for each of the roles that should have access to the menu.

1. Open the role in the Role Editor in Hyperspace (search: Role Editor).
2. In the Menu Information section, check to see if you already have a line overriding or extending menu 34910-IP_MT_PATLIST.
3. If you don't have a line for IP_MT_PATLIST:
    a. Enter IP_MT_PATLIST in the Menu to Extend column
    b. Enter the menu you created in the Menu Descriptor column.
    c. Enter No in the Override column. This extends the released menu using the menu you created, but ensures that users have access to the released menu as well.
4. If you already have a line for IP_MT_PATLIST, do one of the following:
    - If the record in the Menu Descriptor column is a menu, you already have a menu that overrides or extends the released menu. Add your activity to this menu by following the steps in the Group Activities Into Menus topic.
    - If the record in the Menu Descriptor column is an item, you must create a menu that contains this item and the activity you created:
        i. Refer to the Group Activities Into Menus topic for information about creating a menu.
        ii. Then, return to the Role Editor in Hyperspace.
        iii. Enter IP_MT_PATLIST in the Menu to Extend column
        iv. Enter the menu you created in the Menu Descriptor column.
        v. Enter No in the Override column. This extends the released menu using the menu you created, but ensures that users have access to the released menu as well.

Document from a Column

1. In Chronicles, open the Activity (E2N) master file and duplicate an activity record:
    - If you want your column to point to a SmartForm, duplicate activity 49855-ER_FLOWSHEET_POPUP.
    - If you want your column to point to a flowsheet template, duplicate activity 34053-IP_FLOWSHEET_POPUP.
2. In your duplicate activity record, configure parameters to determine which record the column points to and the appearance of the window that is opened:
    a. If you duplicated activity 49855-ER_FLOWSHEET_POPUP change the following parameters in the

Control init parameters field on the General Information screen. Note that you must configure one of the first two parameters, but not both:

- LQFID. Set this to the ID of a flowsheet SmartForm (for a static SmartForm).
- FLTID. Set this to the ID of a flowsheet template (for a dynamic SmartForm or flowsheet template).
- HEIGHT. The height of the Flowsheet window in twips (1/20th of a point). Modify this setting only if you need to change the height of the window because of your monitor settings.
- WIDTH. The width of the Flowsheet window in twips (1/20th of a point). Modify this setting only if you need to change the width of the window because of your monitor settings.
- ROWSONELINE. Enter 1 to display one row on each line in the Flowsheet window. Otherwise, two rows appear on each line when possible. This parameter applies only if you entered a flowsheet template and not a flowsheet SmartForm.

b. If you duplicated activity 34053-IP_FLOWSHEET_POPUP, go to the Control Initialization Parameters screen and configure the parameters. You must enter a flowsheet template in the Flowsheet Template ID field, but other parameters are optional. Refer to the help text for information about the other options.

3. In Hyperspace, go to Epic button > Tools > Column Editor and create a new column.
4. In the Used by field, enter Inpatient EMR and Emergency.
5. Open the Advanced tab and enter your activity record in the Launch activity field. In February 2023 and earlier, this field is on the Application Specific Features tab.
6. Finish configuring your column record as desired and add it to a patient list or a Track Board view.

For information about adding columns to patient lists, refer to the Create a My List or Shared Patient List topic.

For information about adding columns to Track Board views, refer to the Create Track Board Views topic.

Show Sticky Note Text in Patient Lists and the Schedule

You can show a patient's sticky note text in the Patient Lists activity and the schedule to remind clinicians of their sticky notes without requiring them to open the notes.

To show the text, you can show report column 17778-Patient List: MR Sticky Note Text. This column is controlled by extension record 12778-Schedule: MR Sticky Note - PAF, which has no configurable parameters.

To add the text to a patient list:

1. Before a user can add the column to his individual patient list, the column must first be made available to the user. Refer to the Give Clinicians Access to Columns in Patient Lists topic for additional information.
2. In Hyperspace, open the Patient Lists activity.
3. Right-click the patient list to which you want to add the column. Click Properties.
4. Select the My Sticky Note Text column from the Available Columns table. Click Add, then Accept.

To add the text to the schedule:

1. In Clinical Administration, open a profile and select Schedule, Chart Request.
2. Enter report column 17778 in the Available Columns field of the Multiple Provider Schedule Display Options - 1 screen.

3. In Hyperspace, open the schedule.
4. Right-click the schedule to which you want to add the column. Click Properties.
5. Select the My Sticky Note Text column from the Available Columns list. Click Add, and then Accept.

Add a Column for Handwritten Notes on Printed Patient Lists

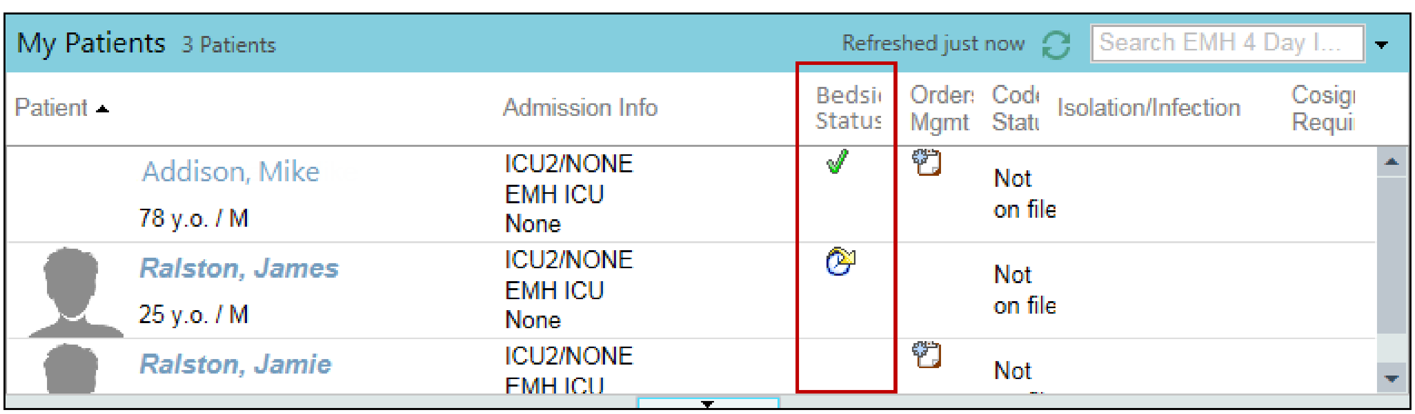
If you have clinicians who print patient lists, you can configure report column 34384-Jot It Down (PRINT ONLY) to print blank lines for clinicians to take handwritten notes on while rounding. For example, you might use this column if your organization implements nursing documentation tools first, and your physicians have read-only access to reports and patient lists. Note that this column should not be added to any column blocks.

As released, the column adds one blank line for each entry on a patient list. To adjust the number of blank lines that are printed, you can configure a copy of extension 88218-IP Jot It Down and add it to a copy of report column 34384:

1. In Chronicles, access the Extension (LPP) master file and duplicate extension 88218.
2. In your duplicate of extension 88218 set the Lines parameter to the number of blank lines you want to print for each entry on the patient list. The maximum number of lines is 10.
3. In Hyperspace, go to the Column Editor:
    - Search: Column Editor
    - Path: Epic button > Tools > Column Editor
4. Search for report column 34384 and click Copy.
5. In the Text Ext field, enter your duplicate of extension 88218.
6. Add your duplicate report column to a patient list.

Add a Column to Show Bedside Tablet Status

You can create an interactive column where users can document whether a patient is using a MyChart Bedside tablet or if they have refused a Bedside tablet. The clinician can click in the column and select the status for the patient among the options that appear. After the user records this information, the column shows the patient's Bedside status with an icon. To document a patient refused a tablet follow the steps outlined here, Document that the patient refused a tablet.



In the Foundation System

To see this feature in the Foundation Hosted environment, log in as your organization's inpatient patient experience representative user (IPPER) and go to the Bedside Requests patient list. Click the Bedside Tablet Status column to complete the flowsheet.

To get started implementing this feature, contact your Epic representative and mention parent SLG 1416567. Your Epic representative can help you incorporate the activity, flowsheet template, flowsheet group, and flowsheet rows from Foundation System. After moving these records into your system, perform the following setup to create a column and add it to a Patient List.

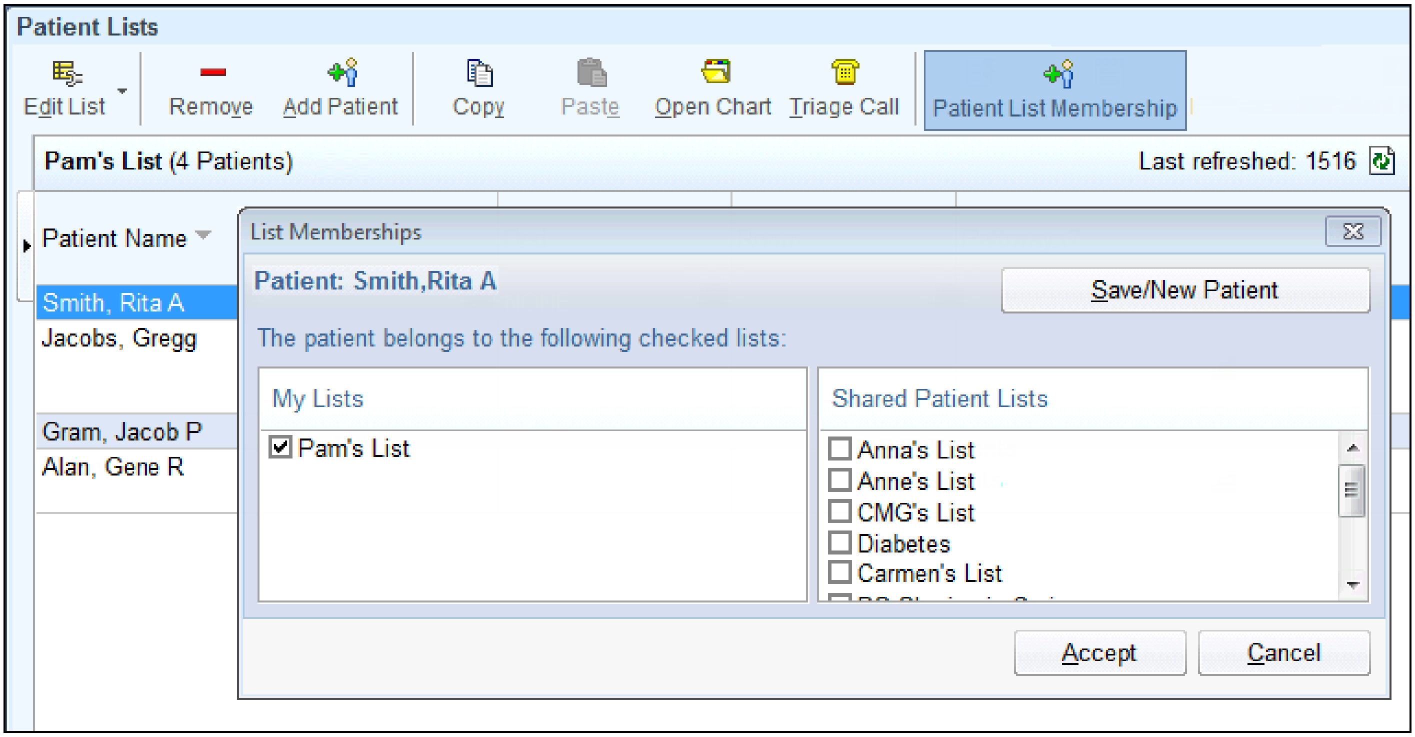
In the Foundation System, reference column 304000178-IP Bedside Tablet Status as a model for this column.

1. In Hyperspace, open the Column Editor and create a new column:
   - Path: Epic button > Tools > Column Editor
   - Search: Column Editor.
2. In the Used by field, enter Inpatient EMR and Reporting Workbench.
3. Open the Advanced tab and enter your activity record in the Launch activity field. In February 2023 and earlier, this field is on the Application Specific Features tab.
4. Finish configuring your column and add it to a patient list.
5. Make sure your column is available to users according to the instructions in the Give Clinicians Access to Columns in Patient Lists topic.
6. Add your column to the appropriate Patient List. For setup instructions, refer to the Create a My List or Shared Patient List topic.

Allow Clinicians to Edit Which My Lists a Patient Is On

Allow clinicians to quickly edit which My Lists a patient is on with the Patient List Membership activity. In this activity, clinicians can see every My List that a patient is on and add her to or remove her from those lists. This feature saves clinicians time from dragging and dropping patients to multiple lists.

You can give clinicians access to this activity by adding it to a menu, such as the Patient Lists toolbar.



In a Workflow Engine rule, extend the menu where you want clinicians to access the Patient Lists Membership activity with menu record 34918-IP_IT_PAT_MEMBER. For information about editing a Workflow Engine rule, refer to the Edit Your Workflow Engine Rule Build topic.

Track and Manage Patients Based on Patient List Membership

There is a flexible set of tools that you can use to help clinicians and others who coordinate patient care do all of the following:

- Keep track of what patient lists their patients are on.
- View the number of patients on a set of patient lists.
- Identify patients who should be on a particular patient list as well as those who are on conflicting or redundant patient lists.
- Update patient list memberships as a result of the information they find.

These tools allow you to search the My Lists, shared lists, and system lists that a particular clinician or group of clinicians finds significant, and let them know whether patients are on any of those lists. For example, a health coach might find it useful to have a report that shows which of the patients on her My List are also on a system list of recently discharged patients or patients who require follow-up in the next three months, so that she can prioritize her work. Clinicians do not need access to all of the patient lists that are searched to see whether a patient is on those lists.

> Keep in mind that this feature can search system lists that don't use custom search logic. When a system list has been added to a My List or shared list that is being searched, the system list is also searched. System lists that use custom search logic and My Lists or shared lists that have such a system list added to them cannot be searched.

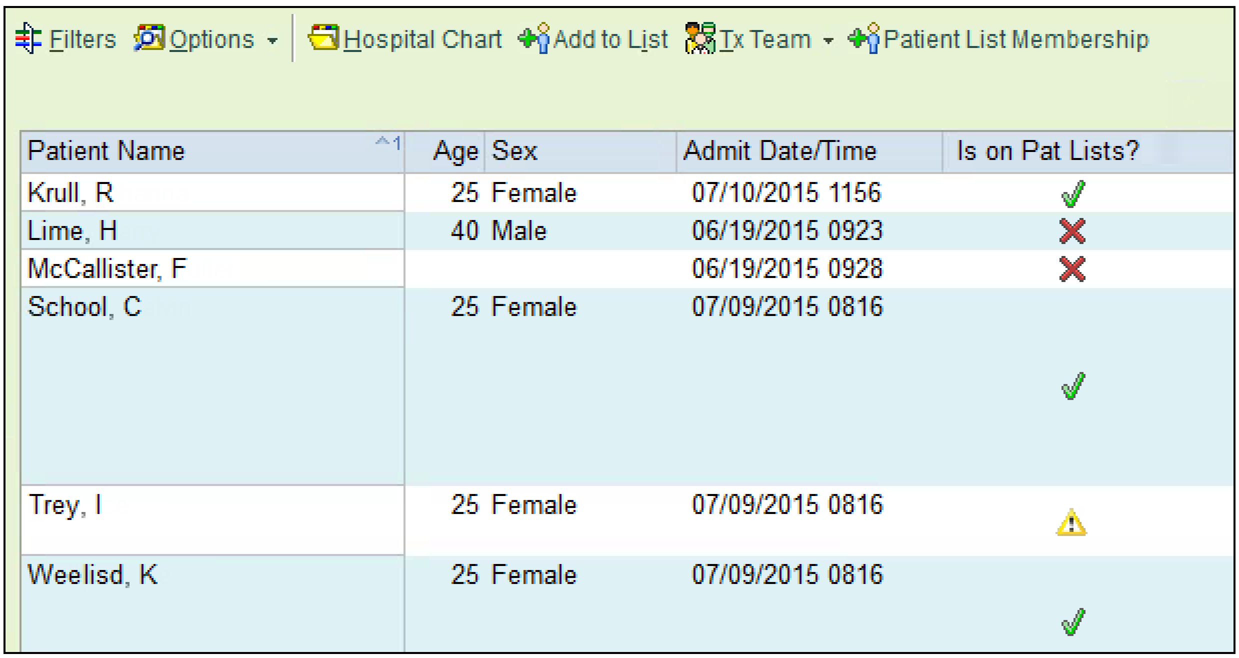
Show Patient List Membership Status in a Column

Use report column 36614-Is Patient On Specified Patient Lists to show a patient's patient list membership status in a Reporting Workbench report. This column uses extension 88394-Is Patient On Specified Patient Lists to search for patients on all of the lists that you specify, and the following icons appear in the column to indicate patients' status on those lists:

- Green check mark: A patient is on one of the specified lists.
- Yellow yield sign: One or more of the lists specified in the extension is not a searchable list. For example, a system list that uses custom search logic that's been added to a My List is not a searchable list.
- Red X: A patient is not on any of the specified, searchable lists.

Report column 36614 is intended for use in Reporting Workbench reports.

You might find this column particularly useful when used with a Providers-based system list that has "Self" entered as the Provider to show each provider only those patients to whom they are personally assigned. Note that hospital outpatient visit patients are not included in these search results.



Configure the extension used to check patient lists to see if a patient is present on them:

1. In Chronicles, enter LPP at the Database initials prompt to access the Extension master file.
2. Duplicate extension 88394.
3. Configure your copy of extension 88394 as follows:
    a. In the My Lists parameter, enter the My Lists on which you want to search for patients.
    b. In the System Lists parameter, enter the system lists on which you want to search for patients.

Create a column for use in Reporting Workbench reports that shows whether a patient is present on specified patient lists:

1. In Hyperspace, open the Column Editor and create a copy of report column 36614:
    - Search: Column Editor

- Path: Epic button > Tools > Column Editor

2. In the Caption field, enter the column header you want to appear in reports. You might want indicate what type of patient lists are being searched in the caption, such as Patients on the 3-mo Follow-Up List. The default caption reads Is on Pat Lists?.
3. In the Used by field, enter Reporting Workbench.
4. In the Text Ext field, enter your copy of extension 88394.

For instructions on adding your column to a report, refer to the Determine Which Columns Appear in a Report topic.

To configure a Providers-based system list that can be used with this new column to show each logged-in provider only the data that pertains to him:

1. In Hyperspace, go to the Patient Lists activity.
2. In the Edit List menu, select Create a System List.
3. In the Name field, enter a title for your system list.
4. In the Group field, select the system list grouper under which you want your system list to appear.
5. On the General tab, enter Providers in the Patient source field.
6. In the Providers field, enter Self.
7. Select the relationship that you want to search for, for example, Attending.
8. Finish configuring your system list.

Filter Reports Based on Patient List Membership

You can configure a Reporting Workbench report to show only patients in specific patient lists in its results using rule property 42434-Is Patient On Specified Patient Lists, which returns the following values:

- 1: A patient is on all of the specified lists.
- 0: A patient is not on all of the specified lists.
- 2: One or more of the lists specified in the rule property is not a searchable list.

You can add this property as a criterion to any Reporting Workbench report.

For more information about how to configure property 42434 in a Reporting Workbench report, refer to the Add Criteria to a Report topic.

Summarize Patient List Membership Status in Radar

When you add report column 36614-Is Patient On Specified Patient Lists to a Reporting Workbench report, it can then be summarized in Radar to show the total number of patients on a given list or set of lists. For example, you can create a column for each patient list of interest to a group of clinicians. You can then summarize the total number of patients on each list using a Radar dashboard component. Users can refer to this summary to make sure patient volumes are evenly distributed across a team of clinicians or establish who should be caring for a patient who appears on multiple My Lists.

To create a Radar component to show the number of patients on a given system list or set of lists, refer to the Create Custom Resources and Components for Operational Dashboards topic. When this topic instructs you to identify a report column for your component, use your copy of column 36614. The way in which you configure the remainder of the component depends on your organization's needs.

Add the Patient Lists Membership Menu Option to Reporting Workbench Reports

You can use action pack 34105-IP RW Patient List Membership to create a menu option that opens the Patient Lists Membership activity from the report in which the column appears, so that clinicians can add or remove patients from a given patient list based on the results of the report. You can add this menu option to any report or report template based on the Generic Patient (EPT) master file, such as report template 34010-Find IP Generic Criteria. When a clinician uses the Patient List Membership activity to change the patient lists a patient is on, she must refresh the report to update what appears in column 36614.

To assign the action pack to a report or report template:

1. In Hyperspace, go to Analytics System Settings (search: Analytics System Settings).
2. Choose the Report-Level Actions tab to assign the action pack to a report or the Template-Level Actions tab to assign the action pack to a report template.
3. In the first blank cell of the first column, enter the report or template that you want to add the action pack to.
4. In the second column, enter IP RW PATIENT LIST MEMBERSHIP in the same line as your report or template.

Turn a My List into a Pre-Login Screen

The Patient Lists pre-login screen shows users non-confidential information about patients without requiring them to log in to Hyperspace. For example, you can configure the pre-login screen on a department monitor to show a My List that has columns for urgent patient alerts and a nurse snapshot report in the preview pane. You can save space by using column blocks to show information from multiple patient list columns in one column.

Considerations
Because users are not logged in, no access logging is done for the patient lists and reports that you configure to appear on the pre-login screen. No audit trail information is gathered when a user accesses a patient list or report from the Pre-Login Patient Lists activity.

Use the Build Wizard in Hyperspace to update your workstation to display Patient Lists on the Pre-Login screen. To get started, open the Build Wizard (search: Build Wizard) and search for feature 340042-Use Web Pre-Login Patient Lists to complete your setup (application: Inpatient Clinical Documentation).

If you need to adjust these settings after running the Build Wizard, refer to the Turn a My List into a Pre-Login Screen topic for manual setup steps.

To make a My List available as a pre-login screen:

1. In the Patient Lists activity, right-click a My List in the Directory pane and select Properties.
2. On the Advanced tab, select the Available at login screen checkbox.
3. Click Accept.

To make a My List the default list on a web-enabled pre-login screen:

1. In Clinical Administration, follow the path Facility Structure > Workstations (LWS).
2. Open your workstation record and go to the Hyperspace Settings screen.

3. In the Alternate login control (I LWS 34100) field, enter 19-Web-Enabled Patient Lists. This option shows the web-enabled pre-login screen. This version does not appear when a user secures a workstation instead of logging out.
4. In the workstation record, go to the EpicCare Settings screen.
5. In the Pre-Login Lists (I LWS 34000) field, enter the My List you created as a pre-login screen.
   - Note that you can enter multiple My Lists in this field, so you can provide users with more than one list depending on the department's needs. If you enter multiple lists, the first one is the list that appears by default. Users can choose other lists in the tree view.
6. In the Pre-Login Screen Reports (I LWS 34010) field, enter the report you want to appear on the preview pane on the pre-login screen. Note that you can enter several reports in this field, so you can provide users with multiple reports depending on the department's needs. If you don't enter any reports in this field, the Report pane is collapsed on the pre-login screen.
7. Complete the steps in the Enable or Disable the Web Patient Lists Pre-Login Screen topic if you are enabling the web-based Patient Lists pre-login screen for the first time.

! If your organization wants to use the classic Patient List pre-login screen, you need to complete setup using Build Wizard feature 340042-Use Web Pre-Login Patient Lists by following these steps:

1. Open the Build Wizard in Hyperspace and search for feature 340042-Use Web Pre-Login Patient Lists (application: Inpatient Clinical Documentation).
2. Enter VB-Only to the question "When using Hyperspace, should workstations use the web migrated version of Pre-Login Patient Lists or the older VB-only version?"
3. Answer the remaining two questions depending on how many workstations at your organization you want to use the classic Patient List pre-login screen.
   - Select all workstations with Pre-Login Patient Lists (VB and Web) already assigned?
     - Answer Yes if you want to update all workstations that have their Alternate login control (I LWS 34100) field set to either 19-Web Enabled Patient Lists or Web-Enabled Patient Lists (VB Fallback) to have their Alternate login control set to 19-Web enabled Patient Lists instead.
     - Answer No if you want to update only the workstation records you specify.
   - Select additional workstations to update:
     - If you answered No to the previous question, enter the names of any workstations you want to revert to using the classic Patient List pre-login screen.

In the Hyperdrive client, Workstation (LWS) records respect the security requirements of the department that they are associated with. In order for the Patient Lists pre-login screen to be used in the Hyperdrive client, you also need to set a Department (I LWS 91) in the workstation record on which the pre-login screen will be accessed.

For more information about setting up workstations, refer to the Workstation Settings for Installing Hyperspace Setup and Support Guide.

Enable or Disable the Web Patient Lists Pre-Login Screen

The web-enabled Patient Lists pre-login screen is streamlined to make space for key information and allows you to add column blocks. However, it doesn't appear on the secure screen when a user logs in to and secures a workstation, whereas the classic Patient Lists pre-login screen does. If clinicians at your organization don't log into or secure workstations configured to show the Patient Lists pre-login screen, you might want to turn on web-enabled Patient Lists pre-login screen. To do so, list a background user for the Patient Lists pre-login screen:

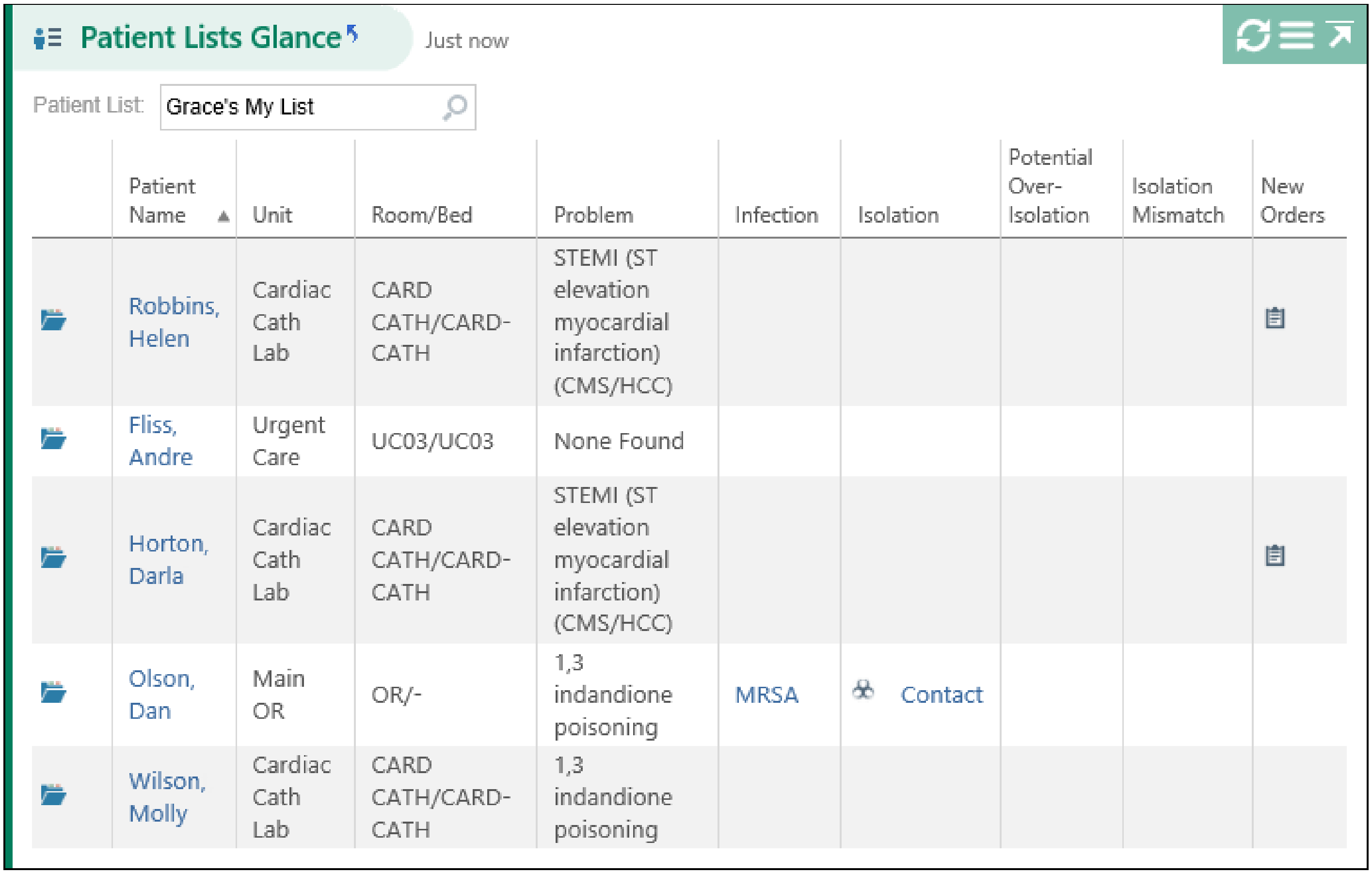
1. In your operational database environment, access Epic System Definitions by going to the Epic Application Menu > Client Systems > Epic System Definitions. If you don't have access to the command prompt, contact your Caché database administrator to complete these steps.
2. Go to Communication > Security > Background User Setup > Module setup.
3. At the Application prompt, enter Inpatient.
4. At the Module prompt, enter PRELOGINLIST.
5. At the User prompt, enter BACKGROUND, PRELOGINPATLIST.

The web-enabled Patient Lists pre-login screen is automatically turned off because it doesn't appear on the screen when a user secures a workstation. If, however, the web-enabled Patient Lists pre-login screen is on for your organization and you want to use the classic Patient Lists pre-login screen, you can turn off the web-enabled Patient Lists pre-login screen by removing the background user. To remove the background user:

1. In your operational database environment, access Epic System Definitions by going to the Epic Application Menu > Client Systems > Epic System Definitions. If you don't have access to the command prompt, contact your Caché database administrator to complete these steps.
2. Go to Communication > Security > Background User Setup > Remove module setup.
3. At the Application prompt, enter Inpatient.
4. At the Module prompt, enter PRELOGINLIST.

Work with Patient Lists from a Radar Dashboard

To enable clinicians to see a My List or shared list of their choice, including some or all of the list's associated columns, and open patient charts directly from their dashboards, you can add dashboard component 34260-IP Patient Lists Glance to their dashboards. Clinicians who use a dashboard as their homepage, or who need to access both a patient list and a schedule at the same time, might find this component particularly useful. When no patient list is specified in the component record, a clinician's default My List appears.



	Patient Name	Unit	Room/Bed	Problem	Infection	Isolation	Potential Over-Isolation	Isolation Mismatch	New Orders
	Robbins, Helen	Cardiac Cath Lab	CARD CATH/CARD-CATH	STEMI (ST elevation myocardial infarction) (CMS/HCC)					
	Fliss, Andre	Urgent Care	UC03/UC03	None Found					
	Horton, Darla	Cardiac Cath Lab	CARD CATH/CARD-CATH	STEMI (ST elevation myocardial infarction) (CMS/HCC)					
	Olson, Dan	Main OR	OR/-	1,3 indandione poisoning	MRSA	Contact			
	Wilson, Molly	Cardiac Cath Lab	CARD CATH/CARD-CATH	1,3 indandione poisoning					

Depending on your configuration, clinicians can select the Patient List View or the Dashboard View from the Column Display field at the top of the component. The Patient List View shows clinicians the columns they see in the Patient Lists activity. The Dashboard View shows clinicians the columns that you have selected for this component.

We encourage you to use dashboard component 34260 as released and configure its parameters at the dashboard level to make it easier to keep up-to-date with any updates we make to this component, unless you need to do any of the following:

- Change the default refresh rate of the component from 5 minutes to another amount of time.
- Remove the refresh button from the component or choose not to show the time of the last refresh in the component.
- Change the default configuration for this component in the same way for multiple dashboards.

To add the released component to a dashboard:

1. In Hyperspace, go to the Dashboard Editor:
   - Search: Dashboard Editor
   - Path: Epic button > Admin > Radar Admin > Dashboard Editor
2. Open the dashboard to which you want to add component 34260.
3. On the Content tab, enter 34260 in the first open row of the Components table.
4. In the Display title field, enter the caption you want to appear in the dashboard for this component.
5. On the Parameters tab, you can configure the following parameters by clicking the plus sign to expand the list of components which contain each listed parameter and selecting the IP Patient Lists Glance

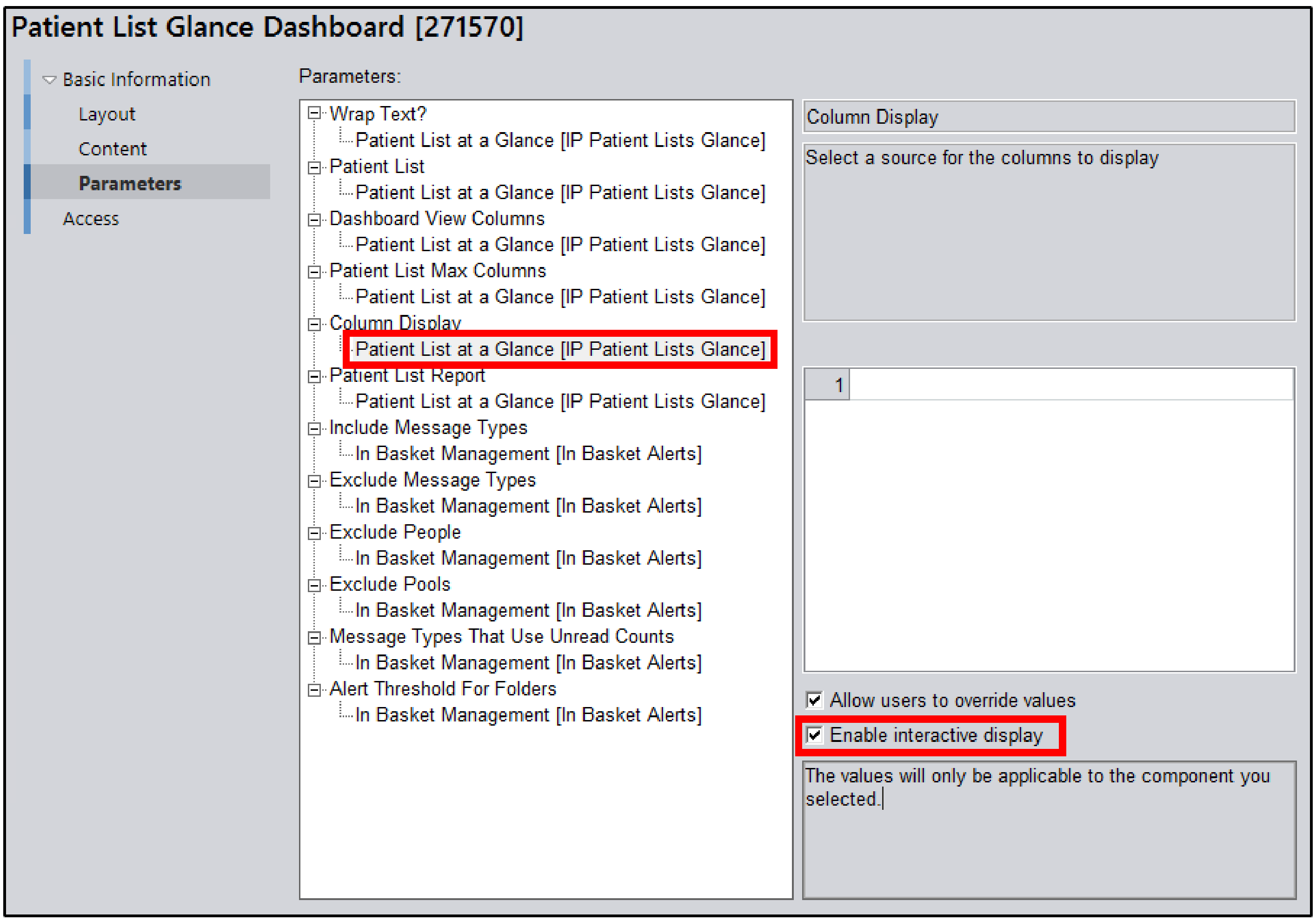
component. If you configure settings while the parameter is selected, all of the components which share that parameter in the dashboard are updated by your changes.

a. Patient List: Select a patient list to show in the component. If you leave this parameter blank, the user's default My List appears. You should leave this parameter enabled for interactive display unless want users to be able to see only the one list you have indicated in this parameter.

b. Dashboard View Columns: Select columns to override the columns determined by the selected patient list. Only the columns listed here appear when a user selects the Dashboard View option. If no columns are listed here, the columns shown for that patient list in the Patient Lists activity appear in the component.

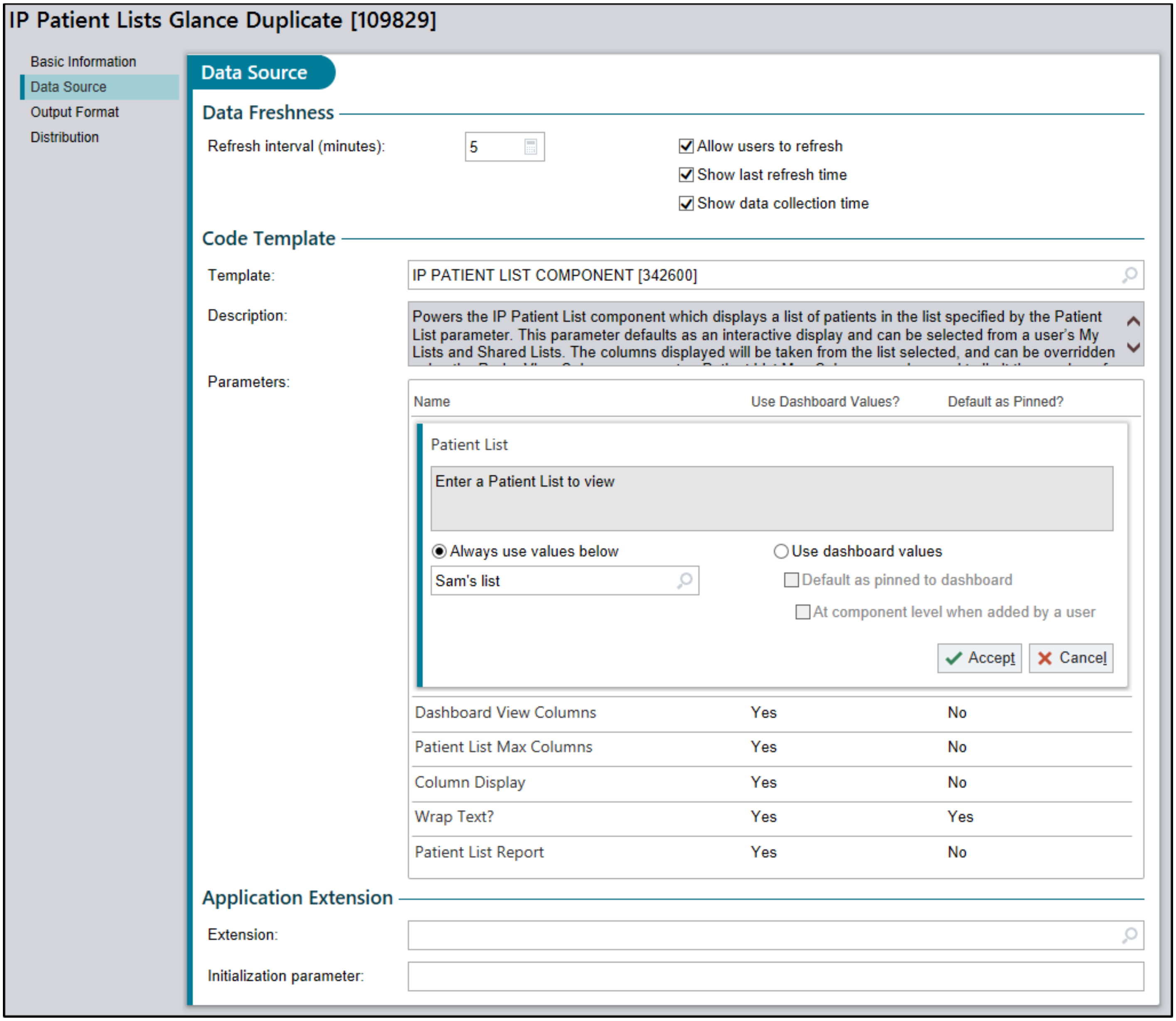
c. Patient List Max Columns: Enter the maximum number of columns to show in the component, up to 25. If no number is entered, the maximum of 25 is allowed.

d. Column Display: Select either Dashboard View or Patient List View to limit the Column Display options available to users. To make both options available, leave this parameter blank and make sure the Enable interactive display option is selected. The Patient List View shows clinicians the columns they see in the Patient Lists activity, up to the maximum number of columns set in the Patient List Max Columns parameter. The Dashboard View shows clinicians the columns you have set for this component in the Dashboard View Columns parameter. If you want users to be able to switch back and forth between the Dashboard View Columns and the Patient List Columns views, select the Default as interactive display check box.



To edit the released component and add it to a dashboard you need to make your own copy of the component and mark it ready for use:

1. In Hyperspace, go to the Component Editor:
   - Search: Component Editor
   - Epic button > Admin > Radar Admin > Component Editor
2. Select the Copy a component tab.
3. Enter a name for the component, a display name, and enter 34260 in the Copy from field.
4. To change the refresh settings, go to the Data Source tab:
   a. In the Refresh interval (minutes) field, enter how many minutes you want the component to wait between automatic refreshes.
   b. Clear the Show refresh button option to remove this button from the component.
   c. Clear the Show last refresh time option to prevent this information from appearing in the component.
5. Also on the Data Source tab, you can configure the parameters for the component, as indicated above.
6. Go to the Distribution tab starting in May 2021 and go to the Access tab in February 2021 and earlier versions.
7. In the Allowed report groups table, enter the allowed report groups for this component. Users with the specified report groups can add the component to dashboards that allow matching report groups.
8. Select Yes in the Enable field starting in May 2021 and select Ready for use in February 2021 and earlier versions.
9. In Hyperspace, go to the Dashboard Editor:
   - Search: Dashboard Editor
   - Path: Epic button > Admin > Radar Admin > Dashboard Editor
10. Open the dashboard to which you want to your component.
11. On the Content tab, enter the name or ID of your component in the first open row of the Components table.



For information on setting up dashboards, including how to add the new component to a dashboard, refer to the Create and Edit a Dashboard topic.

Use Color Highlighting to Draw Users' Attention to Certain Values

You can include color highlighting based on rules or values that you define to draw attention to certain values in columns in the following locations:

- Patient Lists activity in Hyperspace
- In Epic Monitor:
  - Patient Dashboards
  - Nurse's Station, including for pinned patients
  - Index cards in the Watch List

For example, you can create a column that changes color based on how long a patient has been admitted or a column that changes color as environmental services updates the status of a bed from dirty to ready. You can also create a column that changes color based on the tooltip values of icon-only columns, such as those that show results categorized as abnormal, panic, or new.

Sue's List 5 Patients

Patient Name ▲	Age/Sex	Actual Length of Stay (Days)
Carrow, Nick	23 years / M	0
Darcy, Fitz	35 years / M	1
Engel, Wolf	57 years / M	3
Hamada, Pat	26 years / F	5
Summer, Esther	65 years / F	10

You need to make a copy of the extension used by the column, configure the extension, make a copy of the column to use with your duplicate extension, and make the column available for use. The Epic-released records you need to copy are:

Column	Extension	Purpose
12321-Generic Rule Based Highlighter	2394-Patient List - Generic Rule Based Highlighter	Use these records to create a column that highlights patient records based on rules.
12322-Generic Highlighter	2395-Patient Lists - Generic Highlighter	Use these records to create a column that highlights patient records based on the value in the column.

If you are performing setup for extension 2394, you must first configure a rule or rules to evaluate. The rules must be in the Bed or Patient context. For example, you might configure a few rules in the Patient context that use rule property 2508-Length of stay in hours to determine whether a patient's length of stay is less than 24 hours, less than 48 hours, and less than 72 hours. Alternatively, you might configure a few rules in the Bed context that uses rule property 3709-Status to determine whether a bed is Ready, Cleaning, or Dirty. In this example, you'd create three rules. Rules are configured in the Rule Editor:

- Search: Rule Editor
- Path: Epic button > Tools > Rule Editor Tools > Rule Editor

Duplicate the extension:

1. In Chronicles, enter LPP at the Database Initials prompt to enter the Extension master file.
2. Duplicate the extension for the column you want to create.
3. Edit the extension as follows:
   a. In the Column to highlight parameter, enter the column you want to highlight. For example, enter 34721 to highlight the IP Actual Length of Stay column.
   b. Depending on which extension you are duplicating, you need to do one of the following:
      - For extension 2394: In the Highlighting rules parameter, enter the list of rules that you want to evaluate. Rules are evaluated in the order they are entered, and the first rule to evaluate to true determines the color of the column. For example, if you're building a column to

highlight length of stay, you should list your rule for under 24 hours first, then under 48 hours, and so on.

    - For extension 2395: In the Result Values parameter, enter the list of result values that you want to match against. Result values are compared in the order they are entered, and the first value to match determines the color of the column. For example, enter Ready, Cleaning, Dirty if you are evaluating bed status. Note that the values entered in this parameter are case-sensitive.

  c. In the Highlight Color parameter, enter the colors you want the column to highlight in for each corresponding rule or result you entered. If you leave a color value blank, no highlighting appears for the corresponding value.

  d. In the Default Highlight Color parameter, enter the color you want the column to appear if none of your rules are true or no matching results are found. Leave this parameter blank if you don't want any highlighting to appear in this situation.

Duplicate the column:

1. In Hyperspace, go to the Column Editor:
    - Search: Column Editor
    - Path: Epic button > Tools > Column Editor
2. Search for column 12321 or column 12322 and click Copy.
3. Enter a header for your column in the Caption field.
4. Delete the Epic-released extension from the Text Ext. field and enter the duplicate extension you created.
5. Click Accept.

Make the column available to add to patient lists:

1. In Clinical Administration, open the profile of the users you want to have access to this column.
2. Go to the Patient List menu.
3. On the Patient List Columns screen, add the column you created to the Available columns field.

In Hyperspace, add the column to a My List or shared list. To use this column in the Epic Monitor Patient Dashboard, add it to a print group used in a PAF widget or visualization. Or, use this column in the Epic Monitor Watch List by adding it to a report used in Watch List index cards.

Create a Report to Run Only from the Patient Lists Activity

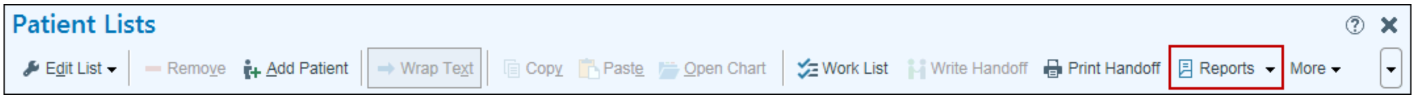
When a user runs a Reporting Workbench report from the Patient Lists activity, the report uses the patient list the user has selected to determine the set of patients to include in the report. You can create reports that are intended for use only in that activity so that you don't have to define a search base for this type of report.

The following report templates have criteria that make it possible to indicate that the selected patient list should be used as the set of patients to report on:

- 440-Find Orders
- 34010-Find IP Patients - Generic Criteria
- 34020-Find IP Patients LDA Criteria Report Template

- 34350-IP Find Alerts
- 34442-INP MAR Report Template

For users to run reports from the Patient Lists activity, you must give them access to the Reports button in the Patient Lists toolbar.



To create and save a report for use only in the Patient Lists activity:

1. In Hyperspace, go to the the Analytics Catalog.
2. Locate the report template you want to create a new report from.
3. Enter any desired or required criteria.
4. For reports built from report template 440:
   - Select the Search base criterion and enter Patient Lists.
5. For reports built from report templates 34010, 34020, 34442, or 34350:
   - Select the Run from Patient Lists? criterion. The value of this criterion is automatically set to Yes and cannot be changed.
6. Save the report.
7. Click the star next to the report title to favorite the report so that it appears on the list of reports in the Reports menu in the Patient Lists activity.
8. In Clinical Administration, go to Management Options > Edit System Definitions (LSD) > Patient List.
9. Go to the Patient List Reports screen.
10. In the Allowed Reporting Workbench Report Types field, enter the report template which you used to create the report. Note that if there are no report templates entered in this field, reports built from all report templates may be run from the Patient Lists activity.

To give users access to the Reports button in the Patient Lists toolbar, you need to extend the Patient Lists menu in their role record:

1. In Hyperspace, go to the Role Editor:
   - Search: Role Editor
   - Path: Epic button > Admin > Access Management > Role Editor
2. Open the role to which you want to give access to the Reports button, such as IP Nurse.
3. Under Menu Information, in the Menu to Extend (I E2R 40) field, enter IP_MT_PATLIST.
4. In the Menu Descriptor (I E2R 45) field, enter IP_MT_PATLIST_REPORTS.
5. In the Override? (I E2R 50) field, enter No.

Add a Banner Print Group

Banner print groups can remind clinicians of a certain patient condition or a workflow that needs to be completed by appearing in a report within a patient's chart. For example, you might want to notify users when they see information about a private encounter.

Banner print groups are associated with specific events or conditions or linked to a rule that specifies when the print group should appear. Epic currently releases several banner print groups. You can create duplicates of these print groups and reconfigure them.

Most banner print groups are attached to reports similar to other print groups. However, copies of the following banners can be attached to profiles and configured to appear in Patient Summary and Patient Lists reports:

- 45792-IP Banner-Generic Rule (RTF)
- 66085-Isolation Mismatch Banner
- 47404-IP LoA Informational Banner (Rich-Text)
- 45571-IP ACP Patient Status Banner

Banners configured in both profiles and reports do not interfere with one another. Banners listed in reports appear within the report, and banners listed in profiles appear at the top of the report.

Considerations
You can show profile-level banners in patient list reports, the Summary activity, and Chart Review.

Configure a Banner Print Group

1. In Clinical Administration, follow the path Reports, Print Groups > Dup Print Groups and copy the appropriate banner print group.
2. Open your copy of the print group and configure the parameters as desired. For example, if you copy print group 45792, configure the rule you want to use to control when the banner appears.

Attach a Banner Print Group to a Report

1. In Clinical Administration, follow the path Reports, Print Groups > Reports and open the report where you want the banner to appear, such as a Patient Summary report.
2. On the Report Definition screens, enter your banner print group in the Report Print Groups (Rich Text) (I LRP 500) field.

Attach a Banner Print Group to a Profile

We recommend that all organizations enable banners showing infection and isolation mismatches, leave of absence information, and active health care agents in profiles. You can make the banners available to large groups of clinicians with settings at specific profile levels.

Because these banners are configured in profiles, you can configure different settings to appear for certain groups of users. For example, you might set banners that appear for all users at the facility level, and then configure more specialty-specific banners to appear for users in a particular department. You can also choose whether the banners appear in the Patient Lists activity, Summary activity, or Chart Review, as well as which banners appear first.

Copies of the following banner print groups can be attached to profiles:

- 45792-IP Banner-Generic Rule (RTF)
- 66085-Isolation Mismatch Banner
- 47404-IP LoA Informational Banner (Rich-Text)
- 45571-IP ACP Patient Status Banner

Enable a Banner Print Group

1. In Clinical Administration, duplicate and configure the banner print group you want to enable.
2. Follow the path Management Options > Profiles and open the profile you want to edit.
3. Go to Chart Review, Summary Report and page down to the Banner Print Groups screen.
4. Add the banner print group you want to configure to the list of print groups in the Print Group (I LPR 44020) field.
5. Choose which types of reports the banner appears in:
   a. Place your cursor in the Print Group field and press F6 to open the Header Banner Locations screen.
   b. Enter Patient Lists, Summary, Chart Review, or any combination of the three.
6. Choose the banner's priority when multiple banners appear:
   - In the Priority field, enter Low, Medium, or High. Banners set to High appear at the top of a report when multiple banners appear, while banners set to Medium or Low appear below banners with higher priority settings. If you do not set a priority, each banner is set to Low by default.
   - If multiple banners have the same priority, they appear based on their order in the Banner Print Groups screen.

Choose the Banner's Priority When Multiple Banners Appear

Hide Banners for a Specific Report

After you've made general banner settings in the EMR System Definitions, facility, or location profile, you can change those settings for specific reports by hiding banners from those reports. To hide banners for a report:

1. Follow the path Clinical Administration > Reports, Print Groups > Reports (LRP) and open the report for which you want to hide the banners.
2. Go to the Header Banner Configuration screen.
3. Enter 1-Yes in the Is this report exempt from header banner LPGs? (I LRP 6060) field.

Hide Banners for Certain Profiles

After you've made general banner settings in the EMR System Definitions, facility, or location profile, you can configure different settings for department- or user-level profiles by hiding general banners and replacing them with more specific ones. To hide an enabled banner for a profile:

1. Follow the path Clinical Administration > Management Options > Profiles and open the profile you want to edit.
2. Go to the Banner Print Groups screen.
3. If the print group you want to hide is not listed in the Print Group (I LPR 44020) field:
   a. Add the print group to the list of print groups in the Print Group field.
   b. Press F6 to open the Header Banner Locations screen and enter a location of None in the Locations field.
4. If the print group is listed in the Print Group field, remove the print group from the list.

Specify the Sort Order for Icons in a Patient List Column

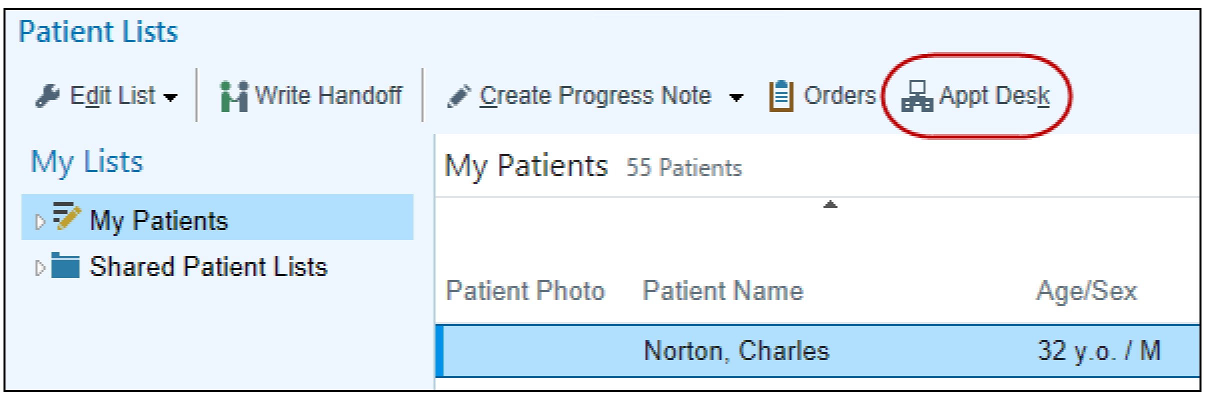
When a user sorts a patient list by a column that shows icons, the column is sorted based on the icon names. You can use an extension to specify the sort order for icons in a column if the default sort order doesn't work for users' workflows. For example, you might want to first show rows with an icon that's associated with the most urgent follow-up task.

1. In Chronicles, access the Extensions (LPP) master file and copy extension 36127-IP Icon Sort.
2. In the first parameter of your copied extension, enter a caret-delimited list of icon names in the order you want them to be sorted.
3. In the second parameter, specify whether you want rows with no icon to appear at the top or bottom of the sorted column. Enter 0 to show them at the top or leave the parameter blank to show them at the bottom.
4. In Hyperspace, open your patient list column in the Column Editor (search: Column Editor).
5. Go to the Definition and Formatting tab, and enter your copied extension in the Sort ext (I PAF 130) field. In February 2023 and earlier, this field is on the Application Specific Features tab.

Allow Clinicians to Schedule Appointments from Patient Lists

If your clinicians schedule appointments, such as rehab or behavioral health visits for admitted patients, you can add the Appt Desk button to the Patient Lists toolbar to give them easy access to the Appointment Desk activity. This button is faster than using the Appts button on the Hyperspace toolbar because it opens the selected patient's Appointment Desk rather than prompting the user to select a patient in the Patient Lookup window first.

Clinicians can use the Appt Desk button to open the Appointment Desk activity for an individual patient, or they can select multiple patients and use the Group Appointment Desk activity to schedule a group appointment for the selected patients.



Use the Build Wizard in Hyperspace to update your clinicians' user roles to add the Appt Desk button to the Patient Lists toolbar. To get started, go to Epic button > Tools > Build Wizard and search for feature 340003-Allow Clinicians to Schedule Appointments from Patient Lists (application: Inpatient EMR).

If you need to tweak these settings after running the Build Wizard, follow these steps:

1. In Hyperspace, open a clinician's user role (search: Role Editor).
2. Enter the following in a new row in the Menu Information table:
   - Menu To Extend = IP_MT_PATLIST (or your custom Patient Lists toolbar menu record if you have overridden the standard one)
   - Menu Descriptor = ES_IT_APPT_DESK_WEB
   - Override? = No

To give clinicians Cadence security to schedule appointments, assign them a Cadence security class with at least the security points listed below set to Yes on the Appointment Entry form (search: Cadence Security). Work with your Cadence team to identify the best Cadence security class to assign to your clinicians.

- View schedules (I ECL 5055)
- Future appointments (I ECL 5056)
- Past appointments (I ECL 5057)
- Enter appointments (I ECL 5050)

Suppress Rich Features in System Lists

Use a checkbox in the My List editor to suppress rich features such as patient photos, column blocks, and hover bubbles in system lists. When this check box is selected for a system list grouper, all the system lists in the grouper appear in a simpler format. Patient photos don't appear, column blocks are split out into individual columns, hover bubbles don't appear, and clinicians can use the Wrap Text option in the Patient Lists toolbar. When the Wrap Text option is enabled, rows expand in height to fit their contents.

We recommend using rich features in patient lists whenever possible so users can benefit from advanced features that allow them to see multiple pieces of information in one spot or drill down further into information using hover bubbles. You might want to use the simpler format if users prefer to have the ability to wrap text, or see more rows on the screen at once.

If a system list is copied to a user's My Lists, the system list uses or suppresses rich features based on the configuration of the user's My Lists. For example, suppose a clinician has not selected the checkbox to suppress rich features in their My Lists. If the clinician copies a system list from a grouper that is configured to suppress rich features, the system list once again uses rich features when the clinician views it in My Lists.

To suppress rich features in system lists:

1. In the Available Lists section in the Patient Lists activity, right-click the grouper you want to edit and click Properties.
2. Go to the Advanced tab.
3. Select the Suppress rich features and allow flexible row height checkbox.

Patient Lists: Ongoing Tasks & Maintenance

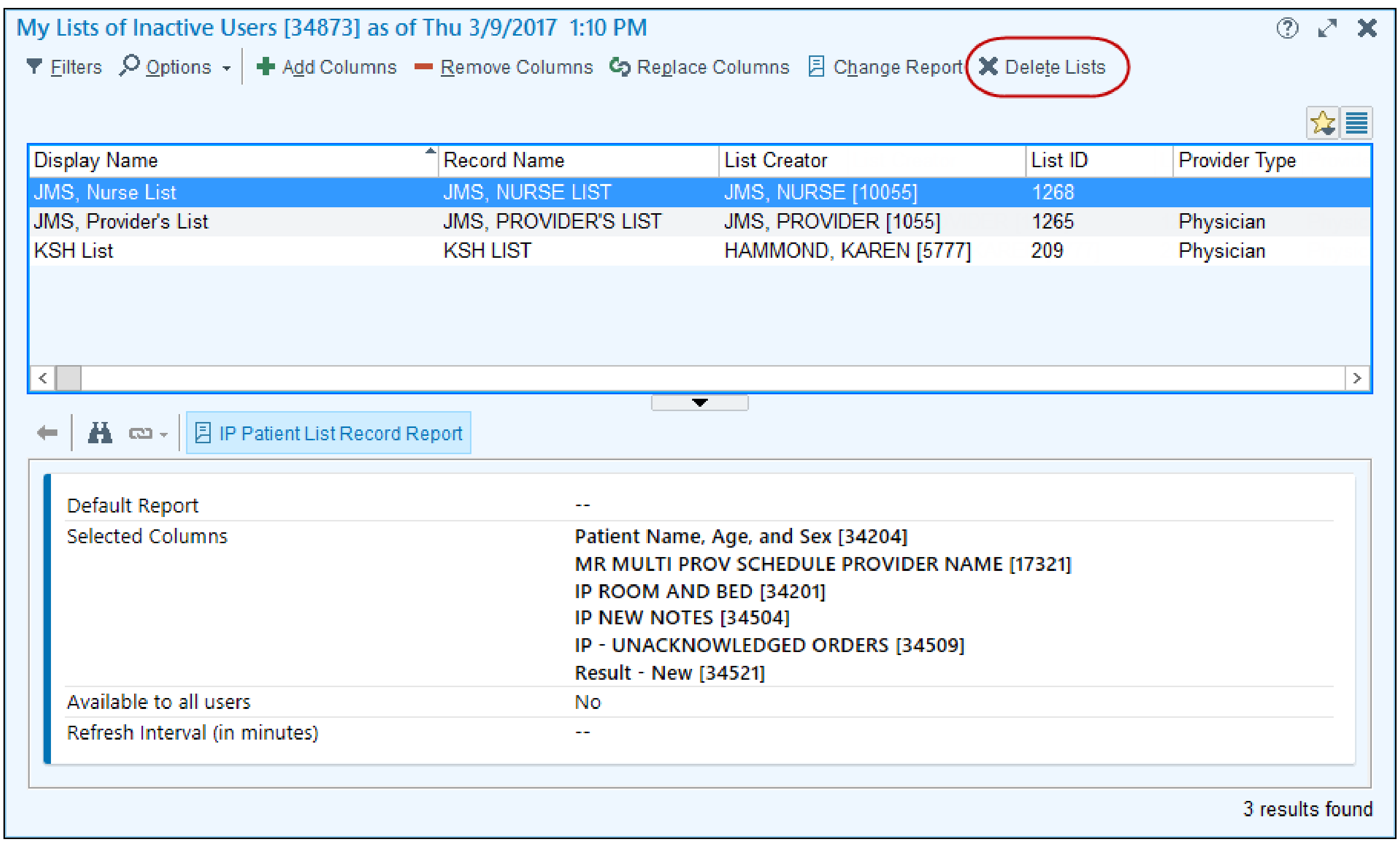
Identify Patient List Records That Need Updates

You can run a Reporting Workbench report to find all of the patient list records that share a certain characteristic, such as a report column or refresh rate, and then choose which records to modify and how from that report. For example, you can find every patient list with a certain outdated report column and replace that column in each list with an updated column right from the report.

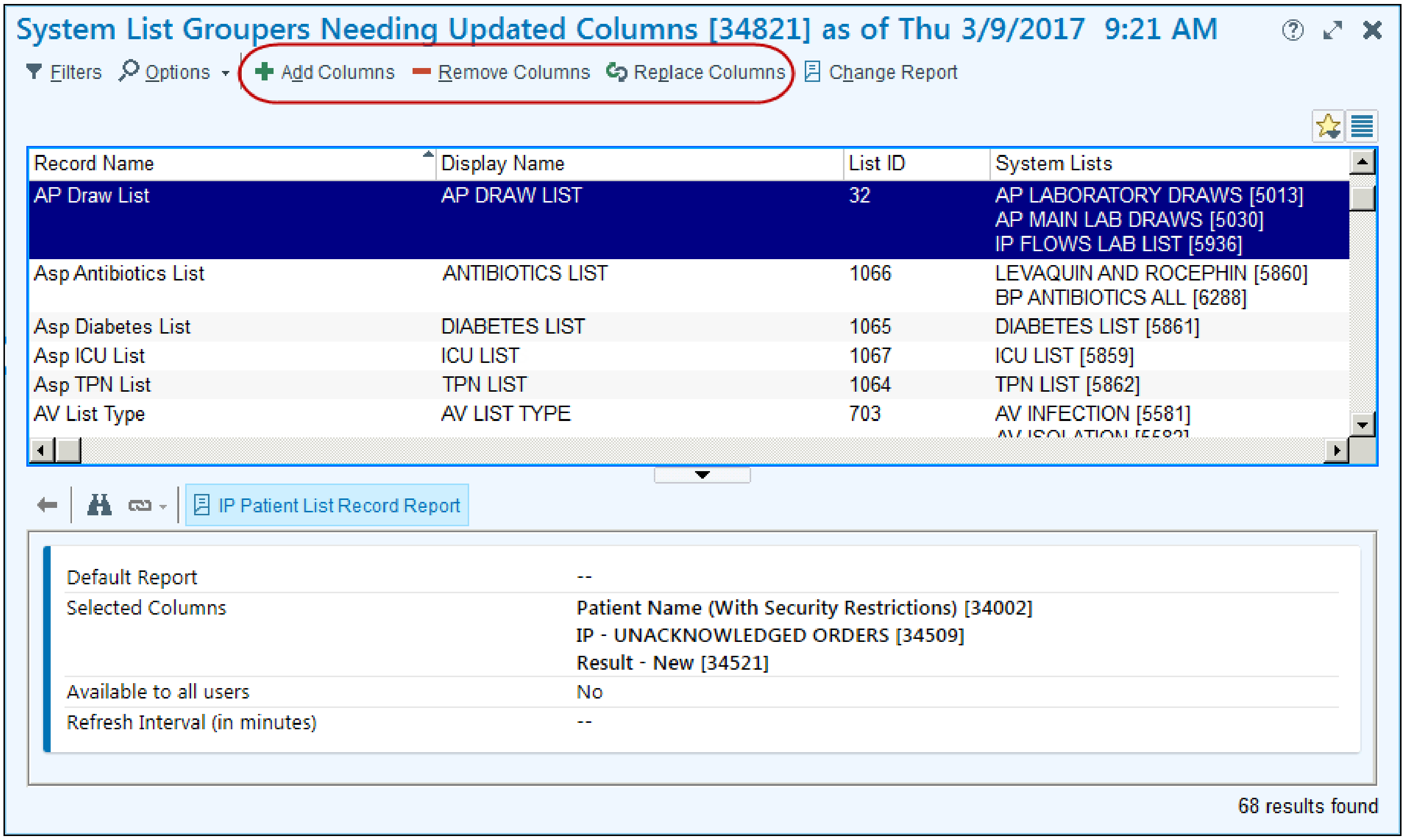
Use the following report templates to create such reports:

- 34360-Column Grouper Search Report Template
- 34361-My List Search Report Template
- 34362-Shared List Search Report Template
- 34363-System List Grouper Search Report Template
- 34364-My List Template Search Report Template

Depending on what kind of update you need to make, there are many ways to build reports from these templates. For example, you might build a report from report template 34361 to identify My Lists for users who are no longer working at your organization and quickly remove them from your system by clicking Delete Lists in the report:



In another example, you might build a report from report template 34363 to find any system list groupers that haven't been edited in more than 2 years. This type of report might be useful if your organization wants to update the columns used to show information in system lists and you want to prioritize updating the system list groupers no one has updated in some time. You can add, remove, or replace columns directly from this report, using the buttons in the report:



For additional information about setting up reports based on these templates, refer to the Report Repository. For information about using a utility to update the patient list records identified by these reports, refer to the Update Many Patient Lists at the Same Time topic. For information about updating the My List assigned to a group of users, refer to the Update Users' Existing My Lists with a Utility topic.

Update Users' My Lists Using My List Templates

My List templates are a great way to automatically create My Lists for your users at go-live, but they're also a powerful tool for managing those My Lists post-live. You configure My List templates to include the columns and column blocks a group of users needs and then specify that My List template in users' profile records. My List templates also allow you to mark certain columns as required, specify the report that should appear in the Report pane by default, attach system lists, and determine how often the list refreshes. For instructions to create My List templates, refer to the Use Templates to Generate My Lists for Users Automatically topic.

When a user logs into Hyperspace and goes to the Patient Lists activity, the My List template specified in his profile record generates a My List for him, but only if he doesn't currently have any My Lists. To update which My List template is assigned to users post-live, refer to the Update Users' Existing My Lists with a Utility topic. To update the My List template already assigned to users, keep reading.

To use My List templates to their fullest extent, it's important to understand what types of changes you can make and how those changes impact your users.

What happens if I update a My List template that's already attached to profile records?

The changes you make to a My List template are automatically propagated to all of the My Lists generated from it the next time users open Patient Lists. To avoid overwriting any changes the user has made to their My List, the updated My List appears to users in the following format: <columns from the updated template> <user-added

columns>

Any non-required columns from a My List template that a user has deleted from their My List reappear when updates are pushed out using the My List template.

What happens if I replace an old My List template with a new My List template in a profile record?

Replacing the My List template in a profile record has no effect on users who already have a My List generated, unless they delete all of their existing My Lists. Any new users who are assigned to the profile and existing users with the profile who delete all of their existing My Lists get a new My List based on the new My List template when they first open the Patient Lists activity.

What happens if I add more than one My List template to a profile record?

When a user doesn't have any existing My Lists, they'll get a new My List for each specified My List template listed in their profile record. If a user already has a My List, no new My Lists are created for that user when you add additional My List templates to their profile record. If an existing user deletes all of their My Lists, then they'll get a new My List for each specified My List template the next time they open the Patient Lists activity.

Update Many Patient Lists at the Same Time

If you have groups of patient list records you want to modify, you can use a utility to update all of those records at once. For example, you might create a new version of a column that is included in the patient lists of all nurses at your organization. Instead of relying on each nurse to update a list to use the new column, you can use this utility to update all nurses' patient lists at once. Starting in November 2022, you can use the Add Columns, Remove Columns, and Replace Columns Activities to add, remove, and replace column blocks (FBL) in addition to columns (PAF).

> **!** The Patient List Management Utilities cannot be used to add, remove, or replace columns in a column block. Changes to column blocks must be made in the Column Block Editor. Refer to the Use Column Blocks to Better Organize Your Patient Lists topic for more information.

To make updating many lists faster and easier, or if you aren't sure which records you need to update, refer to the Identify Patient List Records That Need Updates topic for information about using Reporting Workbench reports to find records.

A utility to update columns also exists for ED and L&D tracking tools. If you need to update ED or L&D tracking tools rather than patient lists, refer to the following topics:

- ED Track Board: Edit Columns in Multiple Views at Once
- ED Manager: Edit Columns in Multiple Views at Once
- Unit Map: Edit Columns in Multiple Views at Once
- L&D Grease Board: Edit Columns in Multiple Views at Once
- L&D Manager: Edit Columns in Multiple Views at Once

Add Columns

1. In Hyperspace, search Add Columns.
2. Starting in November 2022, the activity can act on different types of patient list records at the same time, and the Add Columns activity is opened immediately. In May 2022 and earlier, select the type of patient list

record you want to update.
3. In the Lists to Update field, enter the patient list records you want to update.
4. In the Columns to Add field, enter the columns you want to add to the patient list records you entered.
5. If you are adding the columns to a My List, Shared List, or My List template, and you want to make any of the columns required, select the Required option next to that column's name in the Columns to add field.
6. Click Accept.

Remove Columns

> If the column you're removing was used as the default sort column, the list no longer has a default sort column. If you don't manually set a new one, the list reverts to sorting based on the first column.

1. In Hyperspace, search Remove Columns.
2. Starting in November 2022, the activity can act on different types of patient list records at the same time, and the Remove Columns activity is opened immediately. In May 2022 and earlier, select the type of patient list record you want to update.
3. In the Lists to update field, enter the patient list records you want to update.
4. In the Columns to remove field, select the columns you want to remove from the patient list records you entered
5. Click Accept.

Replace Columns

> If the column you're replacing was used as the default sort column, the column you're replacing it with becomes the new default sort column.

1. In Hyperspace, search Replace Columns.
2. Starting in November 2022, the activity can act on different types of patient list records at the same time, and the Replace Columns activity is opened immediately. In May 2022 and earlier, select the type of patient list record you want to update.
3. In the Lists to Update field, enter the patient list records you want to update.
4. In the Old Columns field, enter the columns you want to remove from the patient list records you entered.
5. In the New Columns field, enter the columns you want to replace the corresponding columns in the Old Columns field.
6. If you are changing columns in a My List, Shared List, or My List template, and you want to make any of the columns required, select the Required option next to that column's name in the Columns to Replace section. If you are replacing a column that is already required, check the box to make the replacement required or leave the check box cleared to make the replacement column not required.
7. Click Accept.

Change the Default Patient List Report

1. In Hyperspace, search Change Report.
2. Starting in August 2021, the activity can act on different types of patient list records at the same time, and the Change Report activity is opened immediately. In May 2021 and earlier, select the type of patient list

record you want to update.

3. In the Lists to update field, enter the patient list records you want to update.
4. In the Default report field, enter the new report you want to be the default report in those patient lists.
5. Click Accept.

Delete Lists

1. In Hyperspace, search Delete Lists. The Delete Patient Lists window opens.
2. In the Lists to Delete field, enter the patient lists you want to delete.
3. Click Delete.

Note that when you click Delete Lists from the Reporting Workbench report, the Delete Patient Lists window does not appear. Instead, a message appears asking if you are sure you want to delete the list or lists selected in the report. Click Delete to delete the lists, or click Don't Delete to keep the lists.

Clear All Columns from a Patient List

1. In Clinical Administration, follow the path Management Options > Utilities > Clinical Utilities > Patient List/Subset Utility.
2. Select Clear all columns. The utility opens.
3. In the List to clear of columns field, enter a patient list.
4. Choose whether you want to generate a report, complete the modification and generate a report, or complete the modification without generating a report. You can also choose to return to the main menu. Press Enter.
5. If you chose to generate a report, select a folder to which to save the report.

Change Multiple Provider Schedule Lists

1. In Clinical Administration, follow the path Management Options > Utilities > Clinical Utilities > Patient List/Subset Utility.
2. Select one of the options under Column Tools depending on how you want to modify the Multiple Provider Schedule list. The utility opens.
3. In the Data Entry Section, enter the column to add or remove. Press Enter.
4. Select the type of patient list you want to modify. Select Include Multiple Provider Schedule Lists.
5. Enter a provider type to modify lists of only certain clinicians, or press Enter to modify all lists. You can make multiple selections. Press Enter after making each selection, or press Enter again to move to the next step.
6. Choose whether you want to generate a report, complete the modification and generate a report, or complete the modification without generating a report. You can also choose to return to the main menu. Press Enter.
7. If you chose to generate a report, select a folder to which to save the report.

Update Users' Existing My Lists with a Utility

The Assign a My List utility lets you update the My Lists of your existing users so that you can push out the latest, greatest My List templates. To avoid overwriting any changes users have made to a My List based on the template you are assigning, the utility won't update My Lists that use the same template. We recommend that you create a new My List template for each substantial set of updates you implement and then run the utility for all affected users at the same time.

To ensure that any new users also receive the latest and greatest My List template, we recommend also removing the old My List template and specifying the new template in the associated profile record. For example, if you create a new My List template for all of your inpatient nurses, also attach the template to the profile record used by your inpatient nurses.

Use the utility to update My List templates:

1. In Clinical Administration, follow the path Management Options > Utilities > Clinical Utilities > Patient List/Subset Utility > Assign a My List Template.
2. At the Patient List prompt, enter the My List template to assign.
3. At the Users prompt, enter one or more individual users, or enter a subset of users.
4. At the next prompt, enter 1-Report Mode. This option produces a spreadsheet of My List template assignments that would be made based on your selections if you ran the utility in Commit Mode.
5. At the server file name prompt, enter a file path on your server to which you have access.
6. Open the spreadsheet saved to the specified file path and review the changes that will be made when you run the utility in Commit Mode. Make note of any users who will not have their My List template updated, so that you can follow up with them individually to either:
    - Delete their current My List so that the utility will generate a new one for them based on the updated My List template.
    - Have them manually update their My List so that it matches your updated version. For example, have them add a column block or remove an outdated report column.
7. Repeat steps 1-3, and then enter 2-Commit Mode at the next prompt to make the My List template assignments.

Update the profile records associated with any users for whom you updated the My List template:

1. In Clinical Administration, follow the path Management Options > Profiles (LPR) > Patient List and open the profile you want to update.
2. On the Patient Lists and Folders screen, enter the name of the template you created in the My List auto-creation templates (I LPR 34530) field. Make sure to also remove any outdated My List templates from this field.

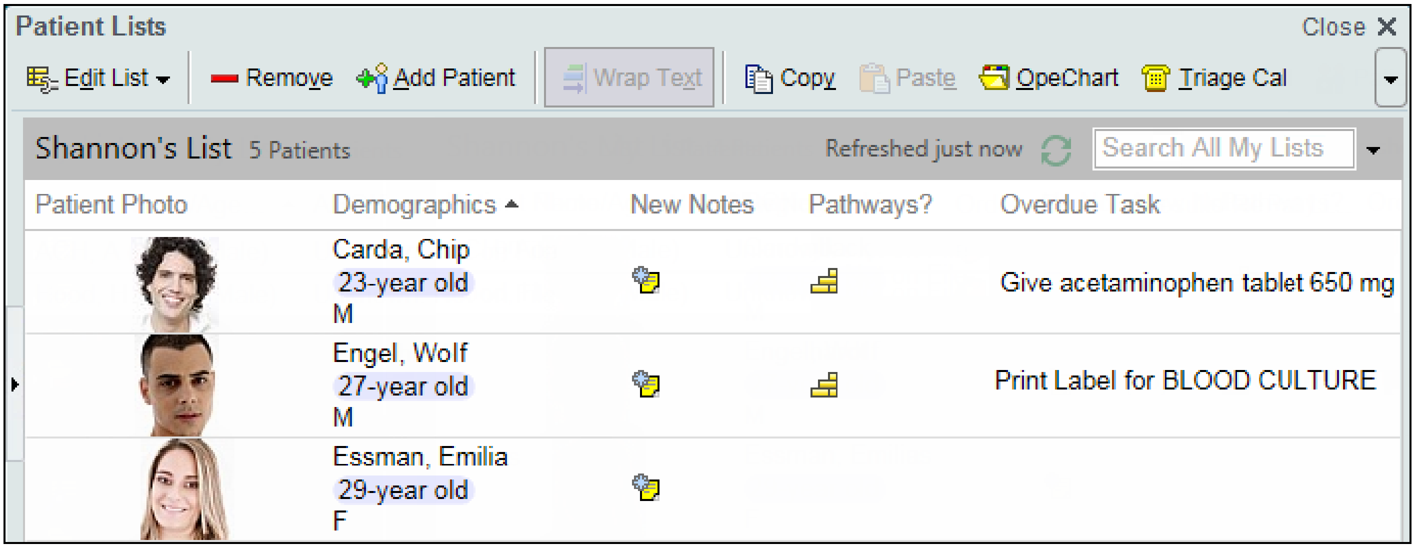
Patient Lists Support: Common Issues & Troubleshooting

Patient Lists switches between two different list views.

Solution

You and your users might notice that the Patient Lists activity switches between two different views when you move between different lists. Which view appears depends on what's included on the list you're viewing.

One view has taller rows and the Wrap Text button isn't available:

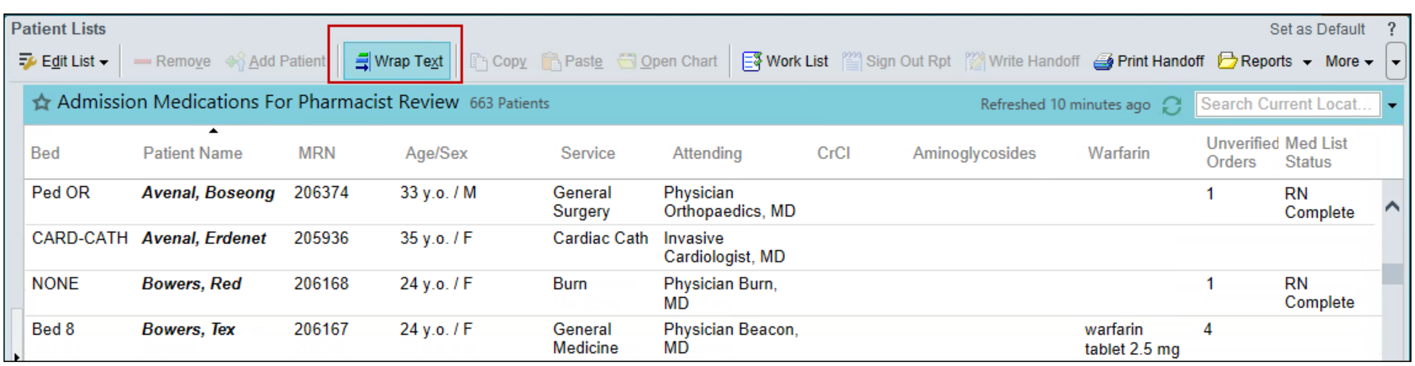


It uses a consistently taller row view so that more information about each patient appears on the screen. This makes it possible to show advanced features, including all of the following, in the Patient Lists activity:

- Patient photos
- Blocks of columns
- Scoring system score columns that include hover bubbles

If any rows shown in this view are taller than three lines of text, users can hover to see the rest of the column's contents. If no advanced features are being used on such lists, then the other view is used because the extra space isn't needed.

The other view has shorter rows and the Wrap Text button is available, which users can click to reduce the height of each row to a single line.



The system list editor does not reflect changes to the facility structure.

Solution

Run the ADT utility Rebuild Location String each time your organization's facility structure is changed or updated. In Clinical Administration, follow the path Facility Structure > ADT > Rebuild Location String.

A patient is stuck on a system list.

Solution

Run either the Rebuild Orders System Lists utility or the Rebuild Treatment Team System Lists utility, depending on which type of system list the patient is stuck on. These utilities fix corrupted indices.

To rebuild treatment team-based system lists:

1. In Clinical Administration, follow the path Management Options > Utilities > Clinical Utilities > Miscellaneous Clinical > Rebuild Treatment Team System Lists.
2. Enter Yes at the prompt. A message appears to confirm that the system lists are being rebuilt.

To rebuild orders-based system lists:

1. In Clinical Administration, go to Management Options > Utilities > Application Utilities > Orders > Rebuild Orders System Lists. In May 2024 and earlier, go to Management Options > Utilities > Orders > Rebuild Orders System Lists.
2. Enter Yes at the prompt. A message appears to confirm that the system lists are being rebuilt.

I can't delete shared patient lists.

Solution

To delete a shared patient list, one of the following must be true:

- You are a Patient List administrator (you have either Inpatient security point 1-Patient List Administrator or EpicCare security point 109-Patient List Administrator).
- You are listed as a user with Delete Patient List selected in the Access Level field on the Advanced tab of the My List Editor.

I don't know whether I use a particular report column in the Patient Lists activity.

Solution

You can use the Patient List/Subset Utility to identify the patient lists on which a particular report column appears:

1. In Clinical Administration follow the path Management Options > Utilities > Clinical Utilities > Patient List/Subset Utility > Remove a column. Note that although you are selecting the Remove a column option, you can choose to view a report of patient lists that a selected column appears on using this option.
2. At the Column to remove prompt, enter the column you want to find.
3. At the Option prompt, enter the type of patient list you want to search. For example, enter 1 to search My Lists.
4. At the next Option prompt, enter any additional patient list type you want to search or press Enter to

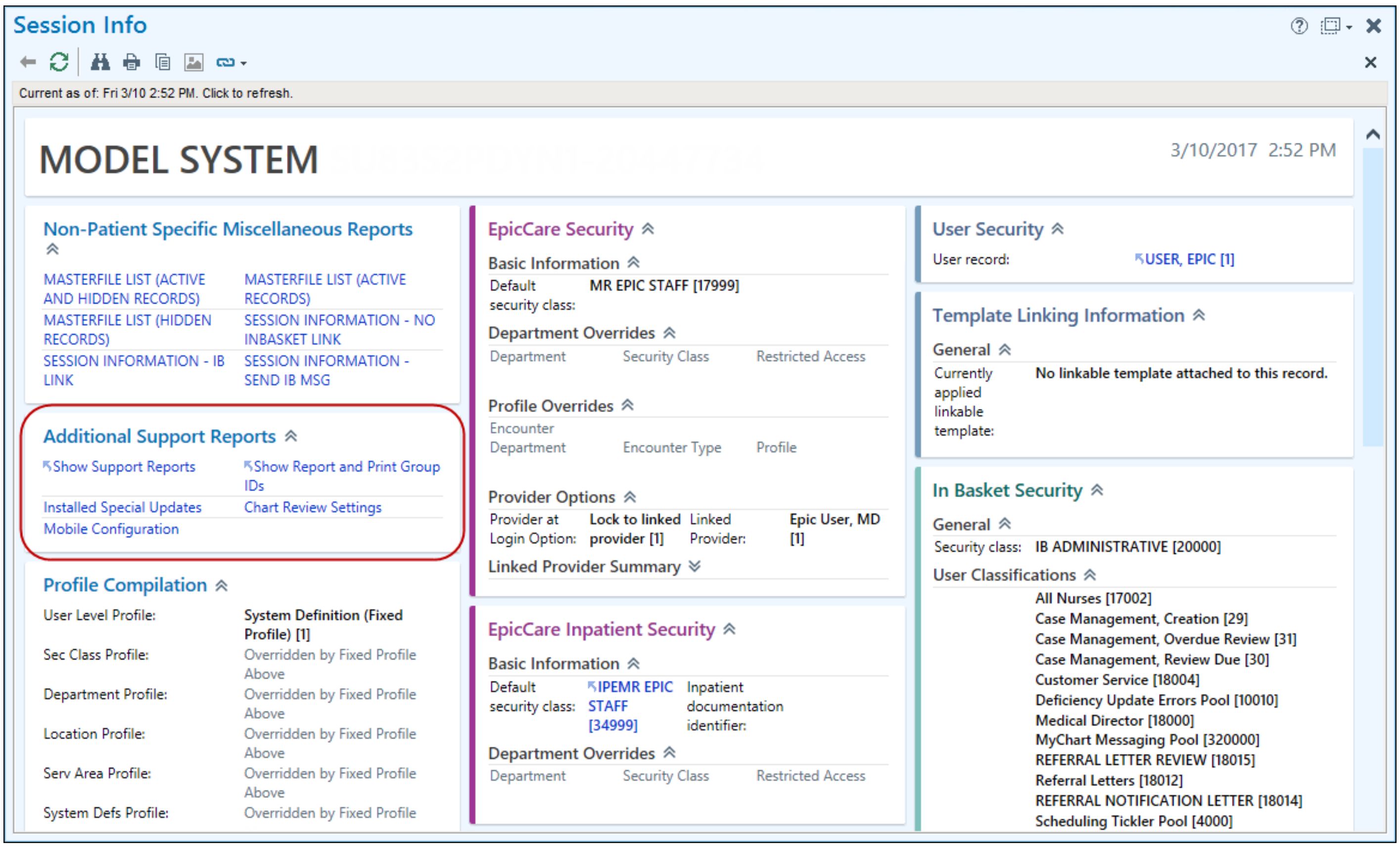
move to the next prompt.

5. At the Provider Type prompt, press Enter.
6. At the Action prompt, enter 1 to generate a report of the patient lists on which the column appears. Note that the other options result in the column you entered being removed.
7. Select where you want to save the report.
8. At the Run the utility with the settings above? prompt, enter Yes to run the report.
9. Review the report to determine where the column is used.

I need help finding record IDs for troubleshooting.

Solution

Project team members can use the Session Information Report in Hyperspace to show information for the current user, including user profiles, roles, security, and workstation records. The report also contains links to turn on other troubleshooting tools, like support reports and report assistance. The Session Information Report can be used in concert with other troubleshooting tools, such as the Record Viewer, to support your users. For example, while the Record Viewer lets you view information about a record once you know its record ID, a support report can help you find the record ID itself.



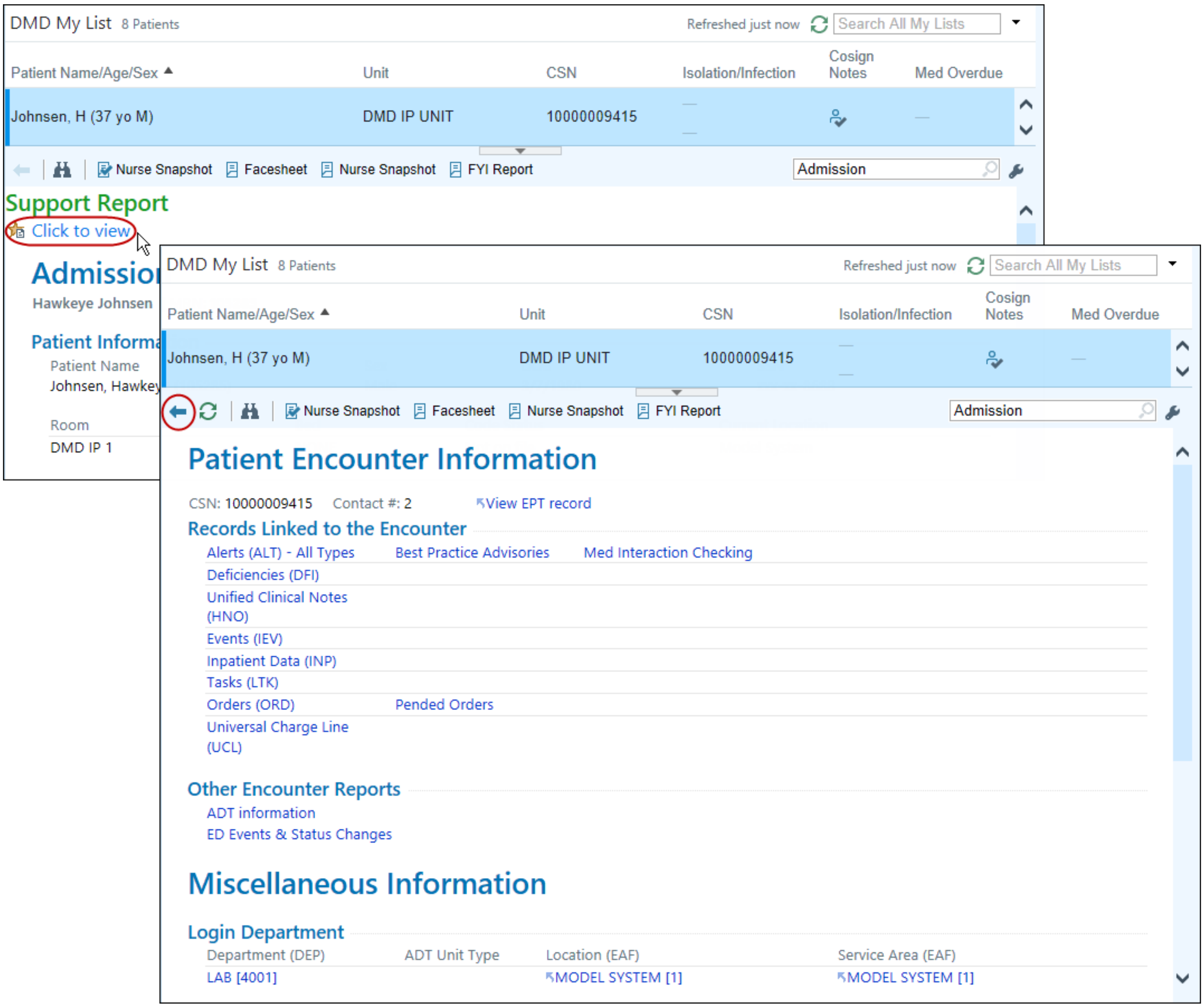
You can use support reports to review:

- What records are linked to a patient's encounter.
- A patient's ADT events, ED events, and status changes.
- Which patients and beds are locked in the current department.
- A user's login department, profile, and ED report information.

To use support reports:

1. In Hyperspace, open the Session Information Report (search: Session Information).
2. From the Additional Support Reports section, click Show Support Reports.
3. Go to the Patient Lists activity and click Click to View in the Report pane. The patient list support report opens.
4. Click the back arrow in the support report to return to the patient list report.

To turn off support reports, click Show Support Reports in the Session Information report.

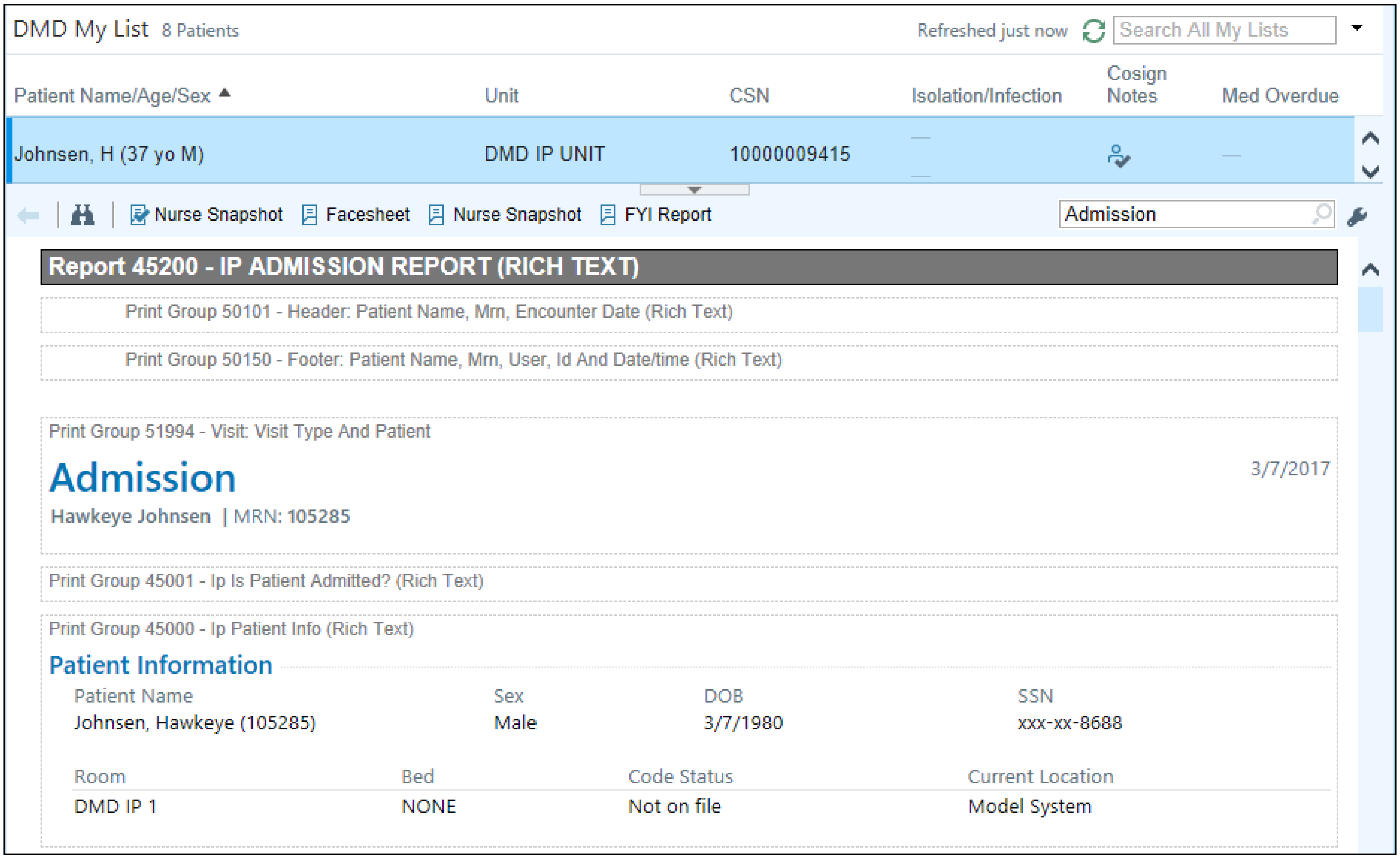


You can use report assistance to show report and print group IDs throughout Hyperspace.

To use report assistance:

1. In Hyperspace, open the Session Information Report (search: Session Information).
2. From the Additional Support Reports section, click Show Report and Print Group IDs.
3. Go to the report you are troubleshooting in Hyperspace. The report and print group IDs appear in the report, as shown in the image below.

To turn off report assistance, click Show Report and Print Group IDs in the Session Information report.



For additional information about using the Session Information Report, refer to The Session Information Report: Troubleshooting Tips topic.

How do the Brain and Patient Lists activities work together?

Solution

The Brain and Patient Lists activities provide different insights into the work that clinicians need to complete and the patients they work with. In general, keep these concepts in mind when deciding which tool to use:

- The Brain is a task management tool. It helps clinicians plan their day by letting them know what's coming up, gives them a clear picture of what needs to be done and when it's due, and makes documentation more efficient.
- Patient Lists is an assignment management and information review tool. It helps clinicians quickly manage the list of patients they are responsible for as needed.

Here are some examples of how clinicians can use these tools during their shift:

- At the beginning of their shift, clinicians use the Brain to get aligned with their patients by reviewing their information in the patient cards, upcoming tasks, and detail reports.
- Throughout their shift:
  - Clinicians use the Brain to see upcoming tasks, document on tasks, and make sure their tasks are completed.
  - Clinicians can switch between Patient Lists and the Brain depending on the information they need. For example, a nurse might use Patient Lists when he gets a new assignment during the shift or

when he gets a call from a patient's family that is not assigned to him.

- During discharge planning and workflows, clinicians use the Brain to review incomplete tasks and required documentation, expected discharge details, and remaining discharge milestones.
- When clinicians are completing workflows that involve managing or assessing information across multiple patients, such as reviewing workflow safety metrics, monitoring LDAs to prevent infection, or managing patient flow across the unit, they use Patient Lists with information tailored to their workflow.

Patient Lists Support: Common Printing Issues

In this section, we've identified a few patient list-specific printing issues and how to resolve them. If you encounter a problem with printing that is not addressed by the troubleshooting information below, refer to the Troubleshooting Printing topic, as well as other topics in the Printing Setup and Support Guide for more information about how printing works in Epic.

What differences might users notice when transitioning to server printing from client printing?

Solution

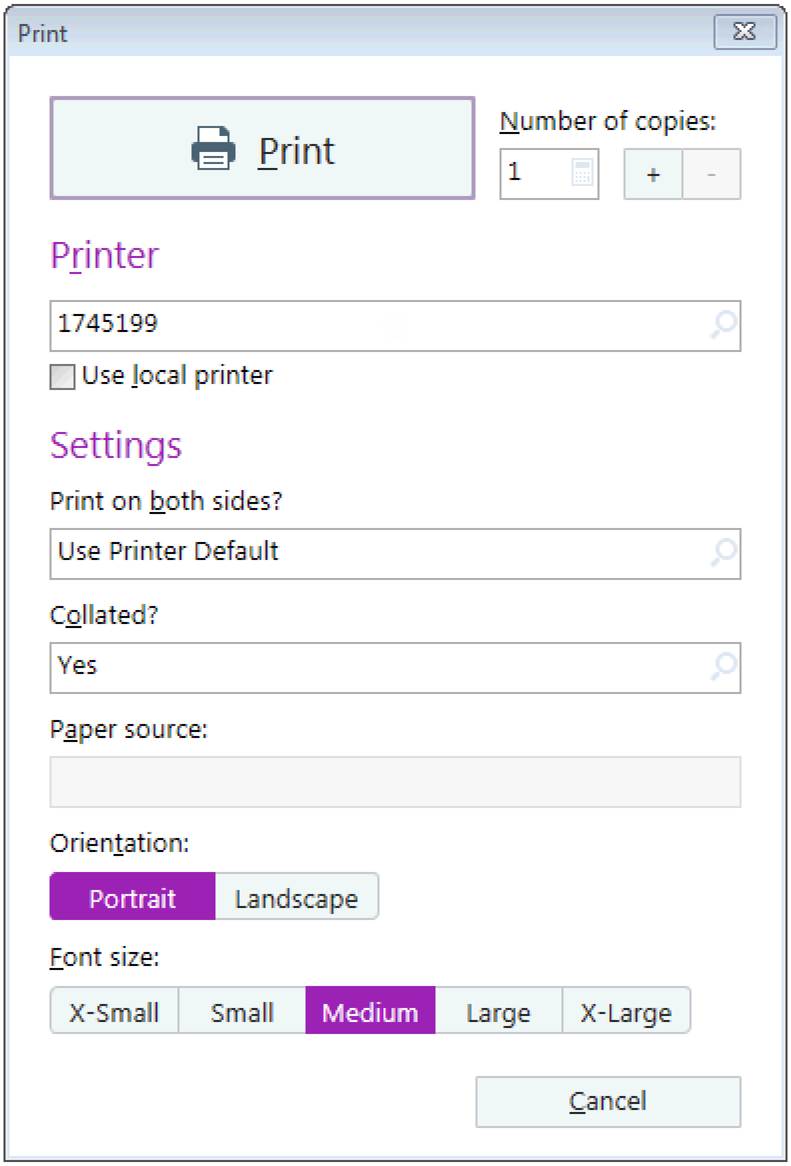
Users with the web-based Patient Lists activity:

- See a server print dialog box instead of the standard Windows print dialog box.
- Can't choose to print multiple copies.
- Send print jobs only to the printers you configure when you map print classes to specific printers.

Can I configure the font size for printouts of patient lists?

Solution

Users can select a font size from the Patient List Printing window.



Why do reports printed from the web-based Patient Lists activity look different from identical reports printed using a batch job?

Solution

Slight visual and formatting discrepancies are expected because the Patient Lists activity uses client printing for individual reports and batch jobs rely on server printing.

Why don't my icons appear in patient lists printed from the web-based Patient Lists activity?

Solution

Icons from the customer-use-only library are not yet supported for printing in the web-based Patient Lists activity. Any columns containing these icons appear blank on printouts.