Patient List (ERS) Master File

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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 List (ERS) Master File

Records in the Patient List (ERS) master file are used to organize patients into useful groupings and provide patient information relevant to those groupings. These records are used to build patient lists in Hyperspace and rosters in Epic's clinical products. They also can be used by EpicWeb to collect data and define columns for various displays.

Starting in Epic 2018

Patient Lists Overview

Patient lists are customized patient search lists that enable users to quickly locate patients, view basic information, and access their medical records. Patient lists are available in the Patient Lists activity.

Patient lists offer you multiple views of patients in your care and can be designed to match your own workflows. Depending on your security, you can create and edit your own lists, use system-generated lists to view information, or open patient charts.

There are three types of patient lists:

- Personal lists, which you build and maintain. Patient lists can also be shared with other users.
- System lists, which your system administrator builds and which automatically include or exclude patient records based on predefined criteria. (Note: System lists are not available for use in EpicCare Ambulatory.)
- Custom system list folders, which are groups of system lists that are built by your facility. The display of custom folders and lists is configured by your facility.

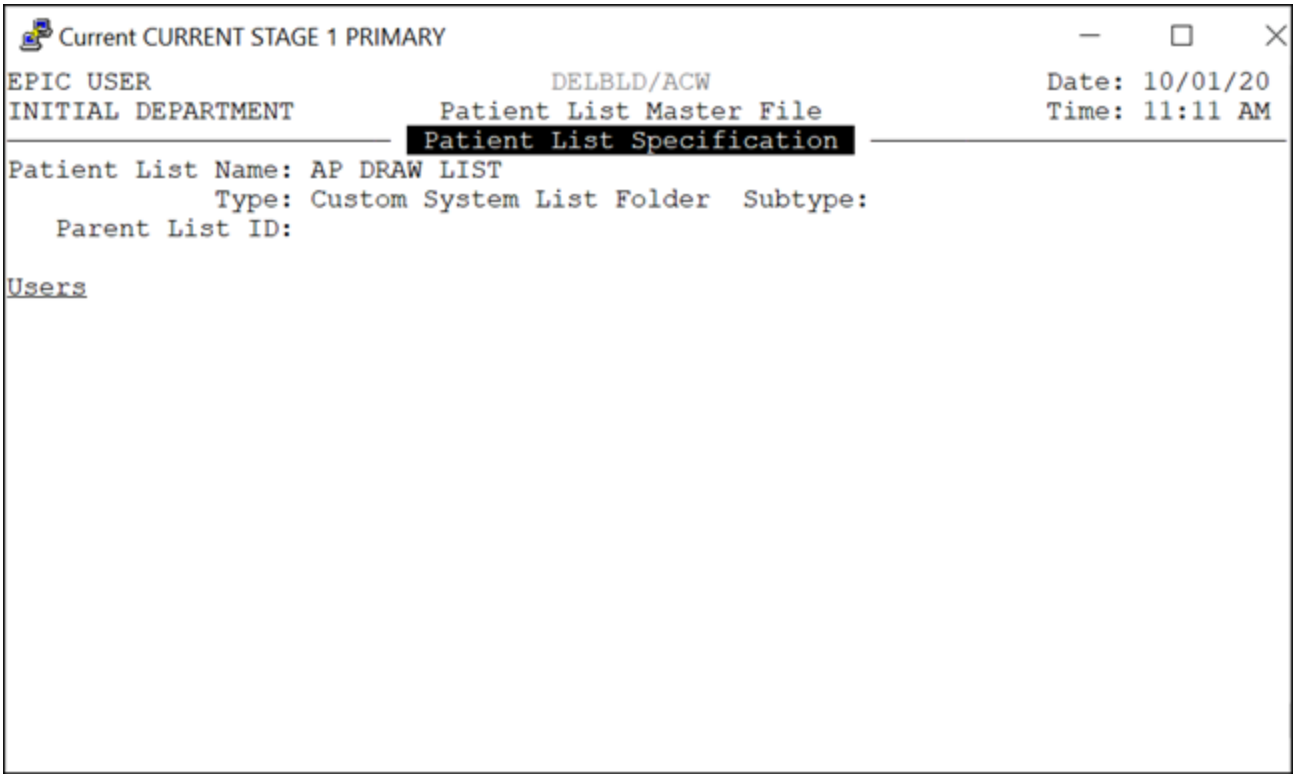
In addition, a patient list can be marked as a parent patient list. If a patient list is set to type Parent, then any patients added through the Patient List/Subset Utility or a routine will generate or populate new "child" patient lists according to information entered on the Parent Patient List Configuration screen. So, for example, if you set the Create/populate PCP's Patient List? field in a parent patient list to Yes, then the first time you add a patient to the parent patient list for a particular PCP, a new user patient list will be generated. This new patient list will take the name of the parent patient list followed by the PCP's ID and name. Then, any subsequent patients added to the parent patient list with the same PCP will be appended to this new user patient list. This can be particularly useful if you have a list of diabetes patients, for example, and you want each user patient list to contain only the patients for a particular PCP.

Prior to November 2020, parent patient lists were referred to as master patient lists.

Patient lists are available in the List Preview activity, which can be configured to appear before you log in to Hyperspace.

Patient List Specification Screen

Use this screen to enter or edit the name and type for this patient list and to assign User patient lists to one or more users.



Patient List Specification screen

Patient List Specification Fields

Patient List Name (I ERS 13)

The name of this patient list.

Type (I ERS 50)

The type of patient list, which determines who can use the patient list in Hyperspace. Shared patient lists are available for everyone to use, while User patient lists are only available to the users specified in the Users field. A third type, Parent (August 2020 and earlier: Master), automatically creates or populates either System or User patient lists when patients are added to the parent patient list via the Patient List/Subset Utility or a routine, according to the information you enter on the Parent Patient List Configuration screen. After you mark a patient list as Parent, you cannot change it.

Subtype (I ERS 180)

Display-only

The Subtype appears if a parent patient list created this patient list. Otherwise, you cannot access this field. For example, if this patient list was created based on the patient's PCP, PCP appears here. If you specify a programming point that creates patient lists based on department, Department appears here.

Parent List ID (I ERS 150)

Display-only

Prior to November 2020, this field was called Master ID.

Displays the ID and name of the parent patient list that created this patient list, if it is associated with a parent patient list. If a parent patient list did not create this patient list, you cannot access this field.

Users (I ERS 100)

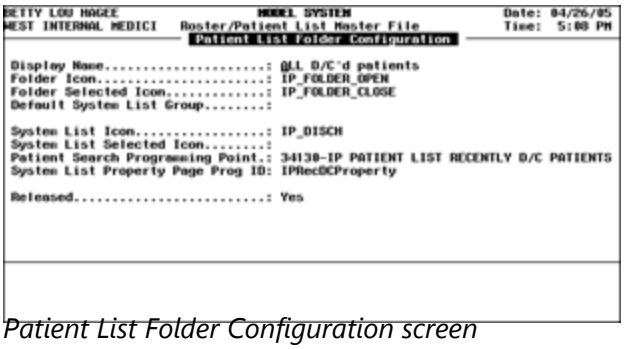
Available only for user patient lists

The users to whom this patient list is available in Hyperspace, if you entered User in the Type field.

Patient List Folder Configuration Screen

Your facility can define its own custom system list groups which, among other functions, can be used to create lists of patients who fit a specific set of criteria (for example, patients who have not yet been admitted). Within each custom system list folder, you can create custom list groups, where each custom list group corresponds to a different system list type. You can customize the display for each custom folder according to the following:

- Each custom list folder can have its own set of associated icons. You can specify an icon to display when the custom list folder is selected and another to display when the folder is not selected.
- Each custom list folder can contain one or more groups, and each group can contain its own custom system lists. The default group appears in angle brackets (for example, "<Default Group>") and is always the last group listed in the folder.
- Each folder can employ its own search logic to determine how patients are added to its lists.
- You can specify an icon to display when a custom system list within a group is selected and another icon to display when the list is not selected. All the lists in a custom list folder use the same icons.



Patient List Folder Configuration screen

Patient List Folder Configuration Fields

Display Name (I ERS 34010)

The name of the custom folder as it appears in the Patient Lists activity. Enter free text.

Folder Icon (I ERS 34230)

The icon to display for the custom list folder when the folder is not selected. Enter the key of an icon in the Inpatient Image Library (InpatientEMR.eil) or any other image library.

Folder Selected Icon (I ERS 34231)

The icon to display for the custom list folder when the folder is selected. Enter the key of an icon in the Inpatient Image Library (InpatientEMR.eil) or any other image library.

Default System List Group (I ERS 34240)

The custom list group to which custom system lists are assigned by default. Enter the name or ID of a system list group within the folder.

When you create a new system list, you can specify the group to which the list belongs. If you do not select a group, the default group is used. If you delete a group, all the lists in the group are moved to the default group.

System List Icon (I ERS 34232)

The icon to display for a custom list in the folder when the list is not selected. Enter the key of an icon in the Inpatient Image Library (InpatientEMR.eil) or any other image library.

System List Selected Icon (I ERS 34233)

The icon to display for a custom list in the folder when the list is selected. Enter the key of an icon in the Inpatient Image Library (InpatientEMR.eil) or any other image library.

Patient Search Programming Point (I ERS 34200)

The programming point that determines which patients are added to the system list. The programming point must be of the type 34530-IP Patient List Patient Search.

Contact your Epic representative for assistance in creating programming points of this type.

When setting up system lists to function as draw lists in Beaker, enter extension record 51855 - Patient Lists: ORD System List Generator.

February 2021 and Earlier: System List Property Page Prog ID (I ERS 34205)

The ProgID of the file that is used to determine how custom system lists can be edited. Enter a ProgID.

When setting up system lists to function as draw lists in Beaker, enter ELabWLSupport?.LabPtListProp as the ProgID.

Starting in May 2021: System List Property Page (I ERS 34206)

The property of the file that is used to determine how custom system lists can be edited. Enter a category list value.

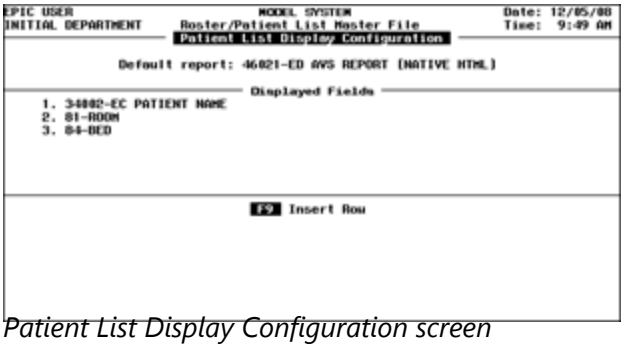
When setting up system lists to function as draw lists in Beaker, enter 6-Lab Draw List as the property.

Released (I ERS 34210)

Indicates whether the custom folder is available for use. Enter Yes or No. The default is No.

Patient List Display Configuration Screen

Use this screen to assign default reports and to configure the columns (census field records) that appear in the patient list.



Patient List Display Configuration screen

Patient List Display Configuration Fields

Default report (I ERS 34004)

Enter a default report of the type Inpatient List Report to display for this patient list. If this field is left blank, the report set up on the Patient List Settings screen of System Definitions is used.

Patient List Display Configuration List

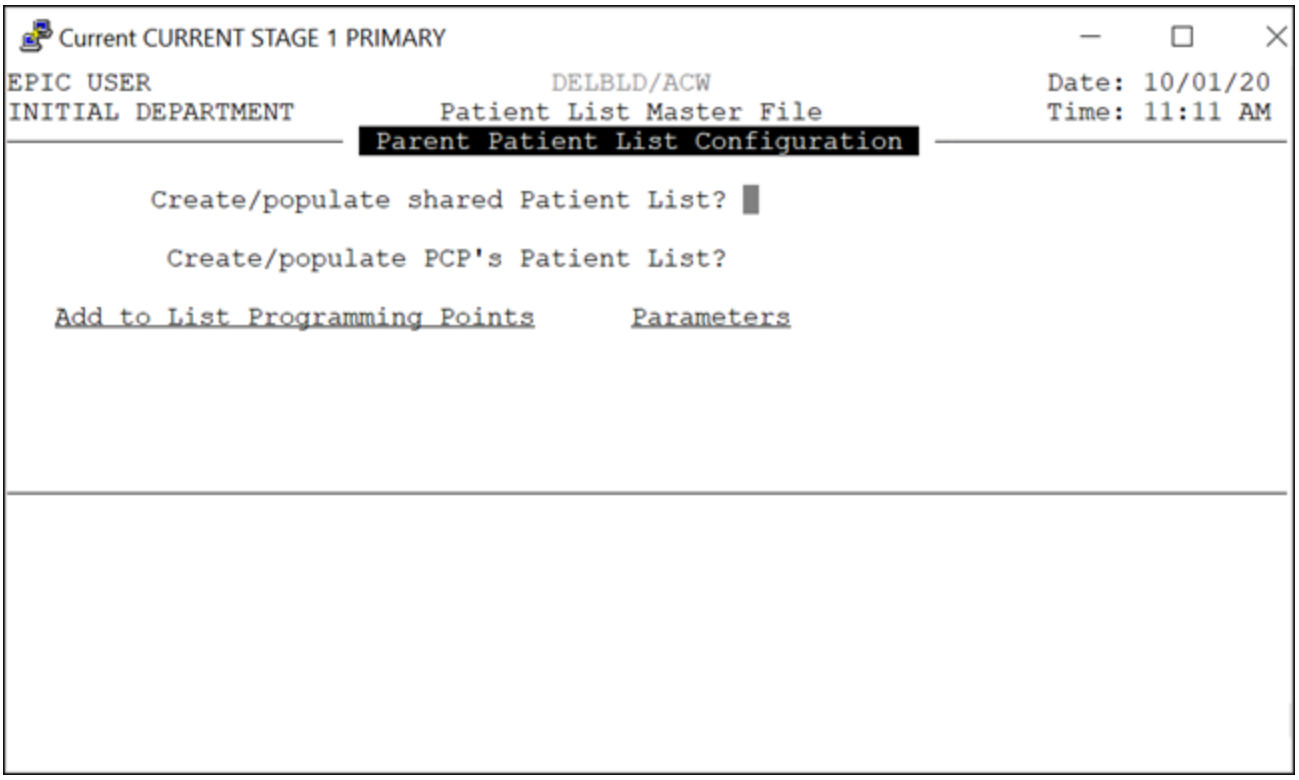
Displayed Fields (I ERS 34002)

Enter a list of census field (PAF) records that determine the columns in this patient list.

Parent Patient List Configuration Screen

Prior to November 2020, this screen was called Master Patient List Conifguration.

This screen appears only if this patient list is of the type Parent. The settings on this screen determine how the system generates and populates parent patient lists. For example, marking the Create/populate PCP's patient list? field as Yes can be particularly useful if you have a list of diabetes patients and you want to create a user patient list containing only the patients for a particular PCP.



Parent Patient List Configuration screen

Parent Patient List Configuration Fields

Create/populate shared patient list? (I ERS 190)

Enter Yes if you want Hyperspace to create and populate a shared patient list when you add a patient to this parent patient list via the Patient list/Subset Utility. The generated shared patient list is named the same as the parent patient list, followed by the word "Shared."

Create/populate PCP's patient list? (I ERS 160)

Enter Yes if you want the system to create and populate a user patient list for each PCP, based on the patient's PCP, when you add a patient to this parent patient list via the Patient list/Subset Utility. The generated system patient list will be named the same as the parent patient list, followed by the word "PCP" and the PCP's ID and name.

Parent Patient List Configuration Table

Add to Patient List Programming Points (I ERS 170)

Enter programming point records if you want the system to create and populate patient lists using other criteria when you add a patient to this parent patient list via the Patient list/Subset Utility. Refer to the Programming Point Records for Patient Lists topic for a list of possible programming point records.

Parameters (I ERS 175)

Enter any parameters that correspond to the programming point.

Programming Point Records for Patient Lists

Epic releases the following programming point records that can be used to add patients to patient lists.

4200-ADD PATIENT TO LOCATION PATIENT LIST (I ERS 170)

This programming point creates and populates user patient lists based on the primary locations of the patients added to this parent patient list. The parameter should be the ID of the user who will access this patient list.

4201-ADD PATIENT TO DEPT ROSTER (I ERS 170)

This programming point creates and populates user patient lists based on the primary departments of the patients added to this parent patient list. The format for the parameter is "DEPT ID, MONTHS, USER ID". DEPT ID is the department for which you want to create a patient list, MONTHS is the number of months since the patient lasted visited the department and USER ID is the ID of the user who will access this patient list.

4202-ADD PATIENT TO ROSTER OF PCP OF SPECIFIC TYPE (I ERS 170)

This extension record creates and populates user patient lists based on the specified type of PCP of the patients added to this parent patient list. The format for the parameter is "Type1^Type2^Type3^...". The parameter can contain any number of PCP types, separated by carets. The PCP types should be numeric values from category list EPT 5655.

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