# Access and Set Up – Creating Patient and Custom Lists

**Digital Health**

**CONNECTING BEST CARE**

Digital Health
Quick Reference Guide

---

**This Quick Reference Guide will explain how to:**

Set up a **Patient List** or a **Custom List**

**Definitions:**

**Patient List** – An organised and easily accessed list of patients. Patient lists can be built and viewed based on customised criteria, patient location or your provider relationship

---

## Creating a Location/Ward Based List:

1. Choose Patient List from the Navigation toolbar.
   Click on the Spanner icon
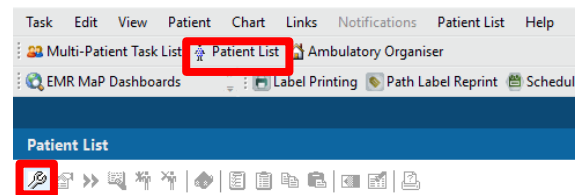


2. **Modify Patient Lists** window will open.
   Click on **New**
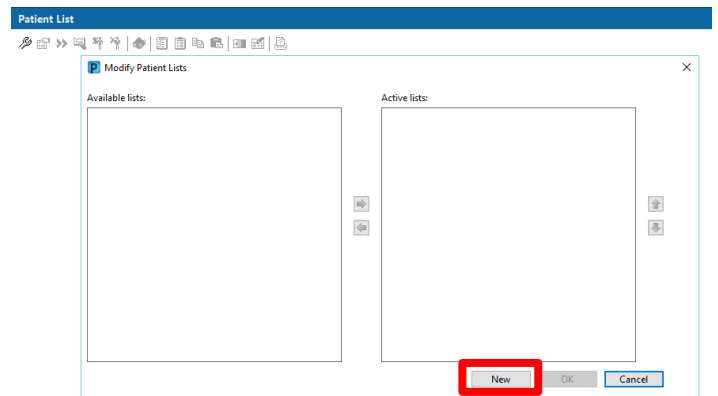


3. **Patient List Type** window will open. Select **Location**. Click **Next**
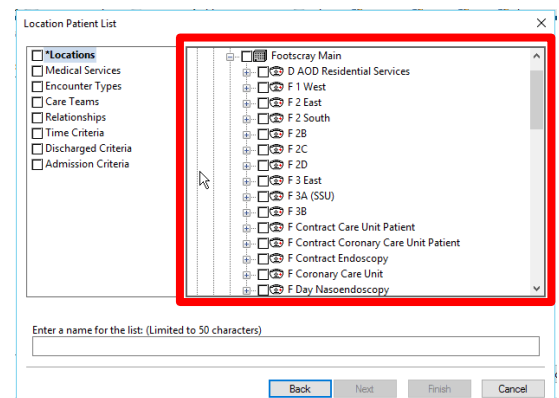


4. Select **Locations**
   **(Do NOT click on the whole hospital during this step, only the + until you get to ward level)**
   - Single-click on the "+" of the required WHS hospital location
   - Single-click on the "+" of required hospital
   - Click the Check-box next to the name of the ward you want to select

   **Note: Some Medical and Allied Health Services do use whole hospital.**

Western Health

**When using this on the Multipatient Tasklist (MPTL), continue through to step 6. Do not 'add the list to the active list' (step 7)**

5.  Select **Encounter Type** and Select appropriate encounter i.e.

    Inpatient or Emergency*, Click **Next.**

    *Please Note: Short Stay Unit (SSU) is classed as an Inpatient Encounter

6.  Select **Discharged Criteria** and Select *Only display patients that have not been discharged*
    Click **Finish**

**Note: For Allied Health who may follow up patients discharged before review, follow steps 1 – 5 again, but at this step select "Only display patients that have been discharged within the last 7 days".**

**You will need to change the List name – i.e. Add the word 'discharged'**

Enter a name for the list: (Limited to 50 characters)
F 2 East - discharged

7.  Select required list from the **Available lists** window. Click **arrow** to add to **Active lists** Window and **OK** to finish.

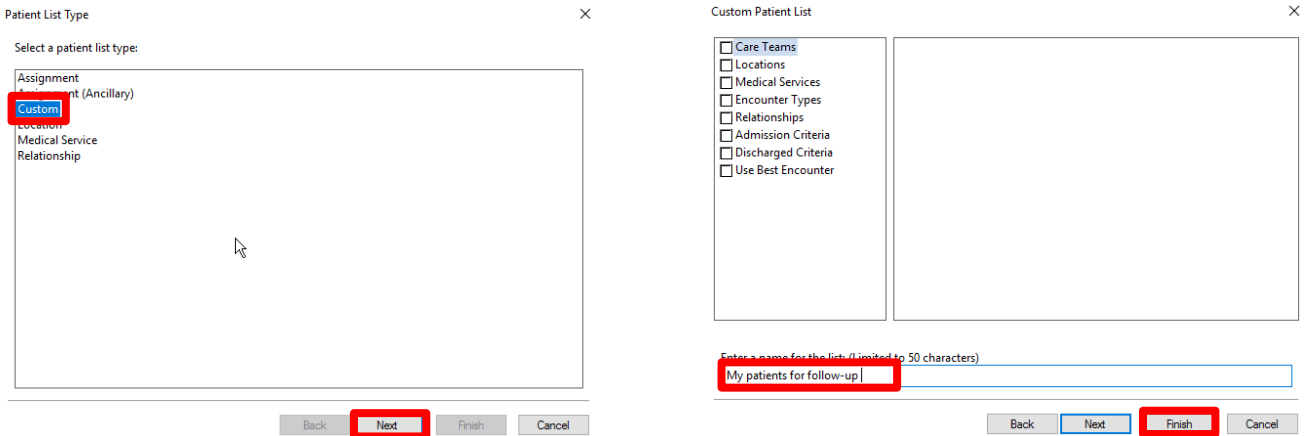## Creating a Specific Unit/Medical Service List:

8.  Select **Medical Services**. Click **Next**. Scroll through list. Click check box next to service required.
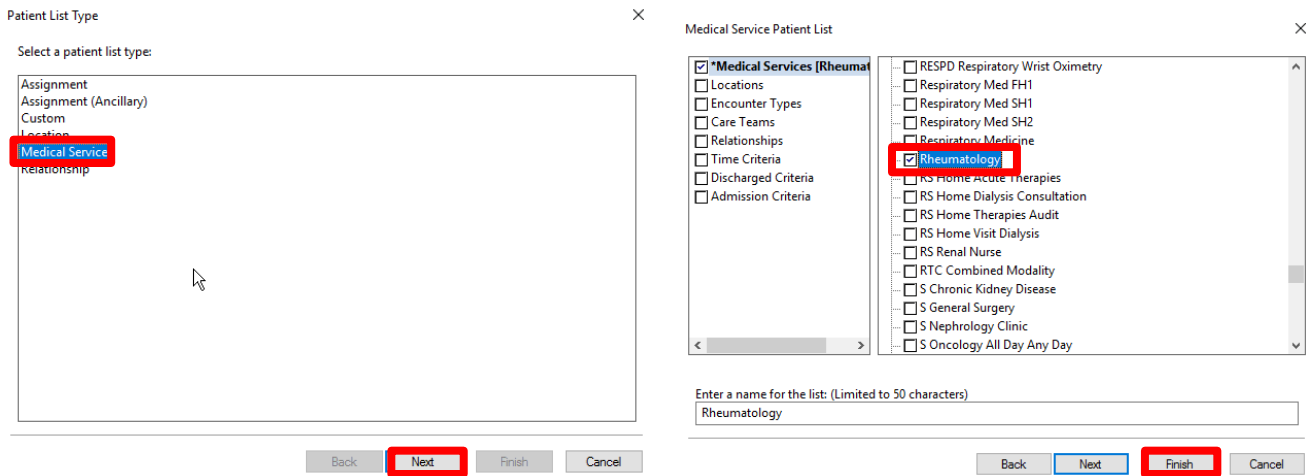


9.  Then follow previous steps 4 – 7 then Click **Finish**

## Create a Custom List:

10. Select **Custom**. Click **Next**. The **Custom Patient List** window opens. Name your list in the box then click **Finish.**



11. To add patients to your custom list from the ward list, hold **Ctrl** on the keyboard and select each of the required patients. **Right click** and select **Add to a Patient List**. Your custom list should then appear for you to select
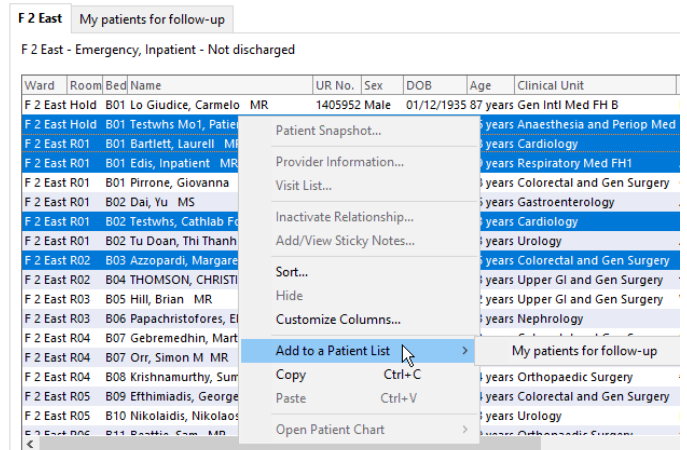
12. Alternatively Search by **MRN** or **Name**

    Click on **Add a Patient**

    Search for your patient then click **OK**. Select correct patient's **Name** and ensure that you select the correct **Encounter**, click **OK**



13. Your patient is now added to your **Custom List**