Handover – Medical Worklists – Setting up Care Team and Patient Lists

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This Quick Reference Guide will explain how to:

- Access Medical Worklists for Handover

- Explain the difference between 'Patient Lists' vs. 'Care Team Lists'?

- Set up Care Team Lists

- Customise your worklist

How to access Medical Worklist for Handover

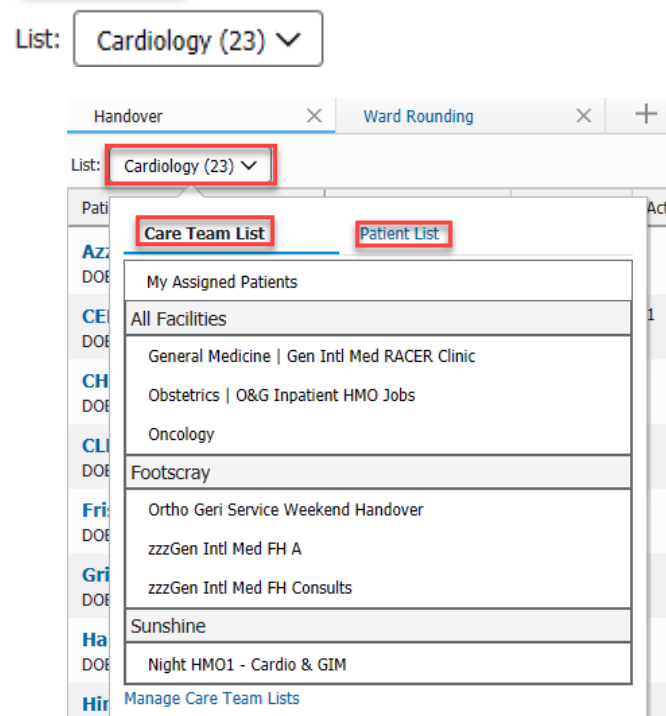1. Navigate to **Medical Worklist** on the navigation toolbar.

2. Click the **Handover** tab.

3. Select **List** from the drop down.

   You will be able to see your selected Care Team Lists, and Patient Lists under each respective tab.

   Not there? Refer to QRG How to set up Care Team Lists

The Medical Worklist for handover can be populated using Patient Lists or Care Team Lists.

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What is the difference between 'Patient Lists' vs. 'Care Team Lists'?

Patient Lists

- EMR users can create their own patient lists (see QRG: Access and Set Up – Creating Patient and Custom Lists)
- If you have created a Patient List which shows currently-admitted patients under a particular unit
  - e.g., Gynaecology, this is a "live" list – patients who are admitted will automatically appear in the list, and patients who are then discharged are automatically removed from the list
- You may also create custom Patient Lists e.g. 'To Be Aware' where patients can be manually added or removed. This list is only visible to the individual user unless they choose to share it with another user.
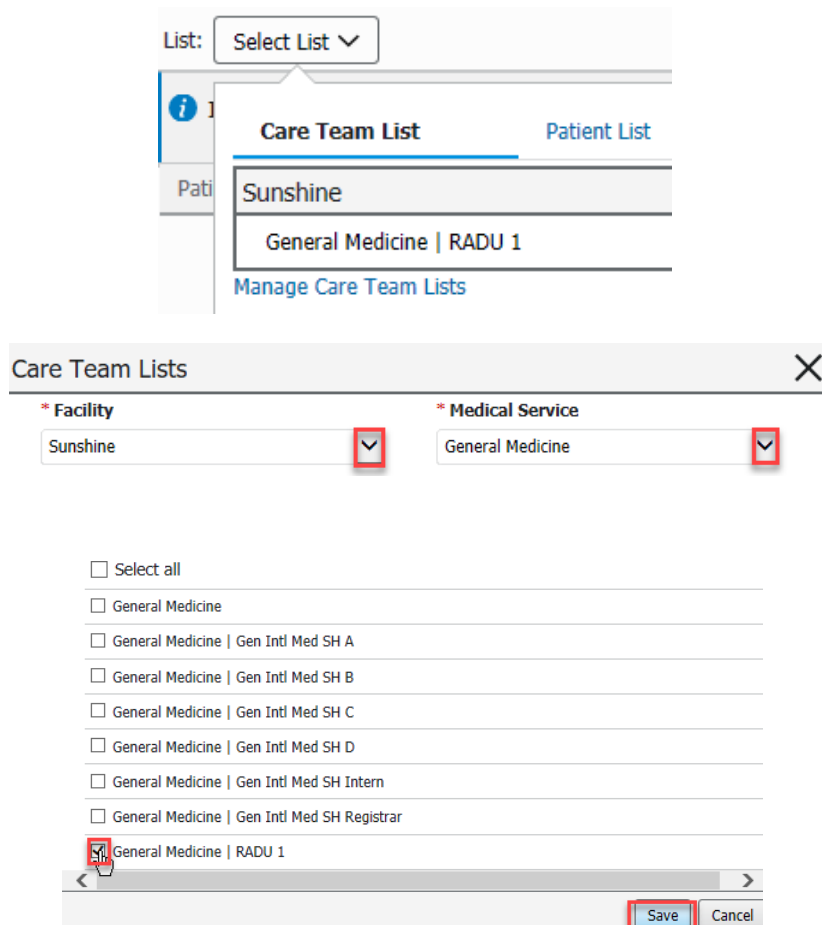
Care Team Lists

- These are essentially consult lists. There are a set number of Care Team Lists on EMR for most units, visible to all EMR users
- **Patients have to be assigned to the Care Team List** and are **NOT** automatically added
- Admitted or discharged patients may be assigned to the list
- If an admitted patient is then discharged, **they will remain on your Care Team List until manually removed** (*Refer to Handover – Medical Worklists – Managing Care Team Lists, Documenting Clinical Information and Print*)

Note: Either a Patient List or a Care Team List can be used for the EMR Handover Tool. If using a "live" Patient List you would not usually need to add or remove patients to the list.

How to Set Up Care Team Lists

1. Select **List** > **Care Team List** by selecting the drop-down arrow

2. then select **Manage Care Team Lists.**

List: | Select List ∨

Care Team List | Patient List

Sunshine

General Medicine | RADU 1

Manage Care Team Lists

3. Select the location under **Facility** and then the M**edical service** you wish to add from the drop-down list

Care Team Lists ✕

* Facility
Sunshine ▼

* Medical Service
General Medicine ▼

4. Select the care teams to add to your profile.

Then click **Save**

☐ Select all
☐ General Medicine
☐ General Medicine | Gen Intl Med SH A
☐ General Medicine | Gen Intl Med SH B
☐ General Medicine | Gen Intl Med SH C
☐ General Medicine | Gen Intl Med SH D
☐ General Medicine | Gen Intl Med SH Intern
☐ General Medicine | Gen Intl Med SH Registrar
☑ General Medicine | RADU 1

Save | Cancel

Customising Your Worklist

1. You can customize the headings of your worklist selecting the **3-lines symbol** -> **Layout Configuration**

2. Select the relevant **headings** you wish to add as columns and click and drag to reorder the way they display then hit **Apply.**
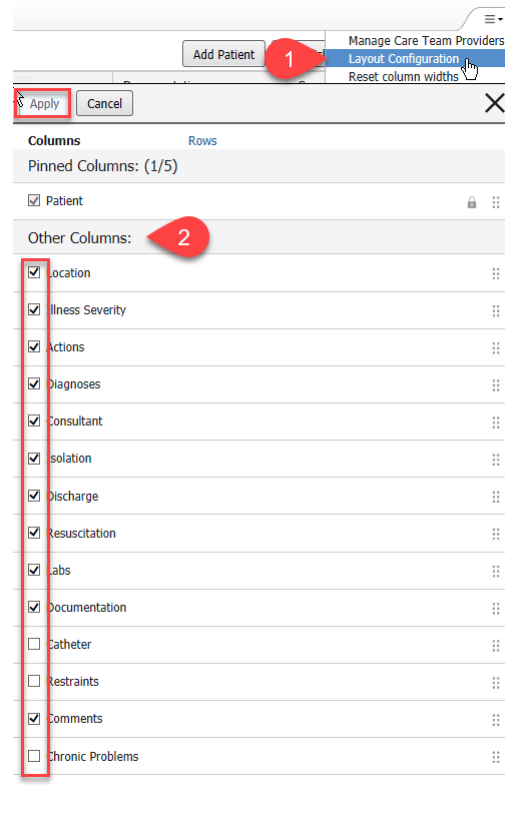
3. You can also customize the number of **Rows** to display on the medical worklist.

   Select **Apply**