

Behavioral Health Therapist Caseload List Creation for Providers

Cerner PowerChart Ambulatory EDUCATION

List Creation

To create a caseload list:

- 1. Click on Dynamic Worklist in the top toolbar.
- 👫 Dynamic Worklist
- 2. Click the drop-down arrow next to List Actions and click Create Worklist.
- 3. Enter a Name for the Worklist.
- 4. Under Worklist Details, select Group/Provider.

Optional: Select Auto-Remove Disqualified Patients, if desired.

- 5. Under Group/Provider, search for and select the provider's name
- 6. In the Relationship Type box, click Lifetime and then select Primary BH Therapist (Lifetime).
- 7. Click Next.

*Name Your Worklist:	Group/Provider		C C C C C C C C C C C C C C C C C C C
Caseload Report	Relationship Type		
Worklist Details	Group(s)	Lifetime O Visit	
Group/Provider	Provider(s)		d
O Location	Clea	r 🗌 Care Manager - Life	MPI Coordinator (lifetime)
Auto-Remove Disqualified Patients	9	Other (Lifetime)	Patient Advocate
	Test MD, Physician	Primary BH Therapist (Lifetime)	Primary Care Physician (Lifetime)

- 8. Select a categorify to add criteria, if desired. Otherwise, click Next.
- 9. Click Finish.

Create New Worklist	2	Create New Worklist	X
1. Worklist Type 2. Criteria 3. Summary Select a category to add criteria 3. Summary		1. Worklist Type	2. Criteria 3. Summary
Age		Worklist Type	
Sex		Worklist Name:	Caseload Report
		Worklist Providers:	Test MD, Physician
and the second	and a free france	Relationship Types:	Lifetime: Primary BH Therapist (Lifetime)
Encounter Type		Criteria	
Laboratory	8		9
Previous	Next Cancel	Previous	Finish Cancel
10. The Worklist is now created.	Dynamic Worklist	00% • • • • • • • • • • • • • • • • • •	10 List Actions Add Patient Remove Patient

