

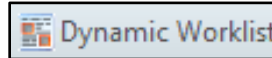
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Overview

Dynamic Worklist is used to identify subsets of patients in PowerChart, gather relevant information about them, and act upon those findings. This manual provides best practice workflows.

To access, click Dynamic Worklist in the top toolbar.

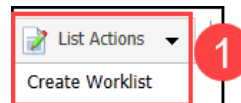


Creating a Worklist

Patient lists can be created from the database with certain criteria established.

To create a Group/Provider Worklist:

1. From List Actions, **click** Create Worklist.
2. **Name** the Worklist.
3. In Worklist Details, **click** Group/Provider.
4. **Select** Provider.
 - a. Enter provider(s).
5. **Select** Relationship Type.
6. **Click** Next.
7. **Select** appropriate filters for the list.
8. **Click** Next.
9. On Summary, **review** information.
10. **Click** Finish.



Note: Special characters or punctuation are not allowed in the list name field.

Note: When creating a list, the establishment of a Dynamic Worklist Group and a Provider Relationship type is required.

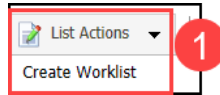
Check the summary to ensure proper parameters are defined.

Dynamic Worklist Manual for Providers, Clinical and Clerical Staff

Cerner PowerChart Ambulatory EDUCATION

To create a Location Worklist:

1. From List Actions, **click** Create Worklist.
2. **Name** your Worklist.
3. In Worklist Details, **select** Location.
4. **Add** appropriate Facility(s).
5. **Define** a Lookback Range.
6. **Click** Next.
7. **Select** appropriate filters for the list.
8. **Click** Next.
9. On Summary, **review** information.
10. **Click** Finish.



Note: Special characters or punctuation are not allowed in the list name field.

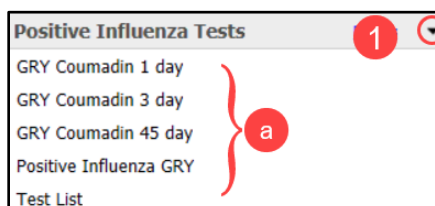
Note: When using Location, it will show any patient with any provider from that location in the timeframe given.

Check the summary to ensure proper parameters are defined.

Viewing a Worklist

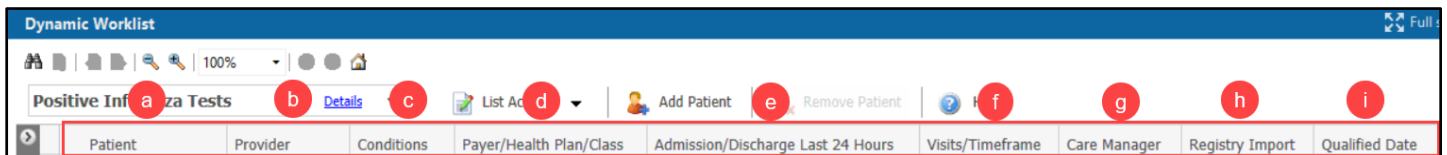
To view a Worklist:

1. **Click** the dropdown arrow:
 - a. **Click** the Worklist desired.



Design and Layout

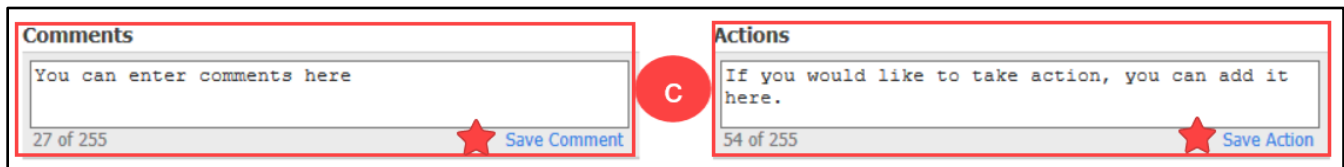
- a. Patient: Displays the patient’s name, date of birth (DOB), gender, Medical Record Number (MRN), ranking, and comment indicator.
- b. Provider: Displays the Primary Care Provider or Responsible Provider for that patient.
- c. Conditions: Displays any conditions for the patient that have been established and pulls from the chronic conditions from within the patient's problem list.
- d. Payer/Health Plan/Class: Displays patient’s insurance information.
- e. Admission/Discharge Last 24 Hours: This is not applicable to ambulatory sites.
- f. Visits/Timeframe: Displays how many outpatient encounters have taken place for this patient within the past 365 days.
- g. Care Manager: Displays the Care Coordinator for that patient.
- h. Registry Import: Displays the name of the registry from which an import has been performed.
- i. Qualified Date: Displays the date the patient was added to the list.



Expanding Lists

There are a few actions that can take place within the Expanded View.

- a. Selecting the side arrow displays a summary page.
- b. Selecting Open Summary, Send Message, Create Reminder, Assessments will perform that function.
- c. Enter Comments or Actions if desired.

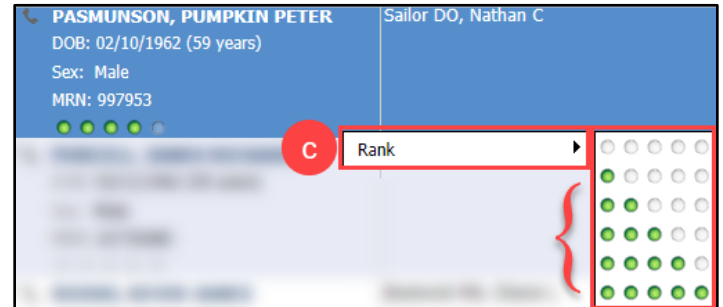
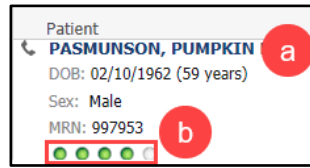


Note: The summary page only reflects the highlighted patient. The dithered patients cannot be selected unless the current patient is closed.

Ranking Lists

The ranking system allows prioritization of patients on the list.

1. From the Worklist:
 - a. Navigate to patient.
 - b. Rank the patient by:
 - i. **Click** number of circles (1-5).
 - ii. 1 Low, 5 High.
 - c. Or **right click**.
 - i. Rank based on number of circles.



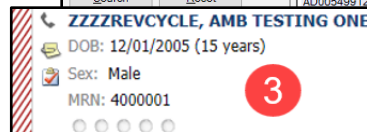
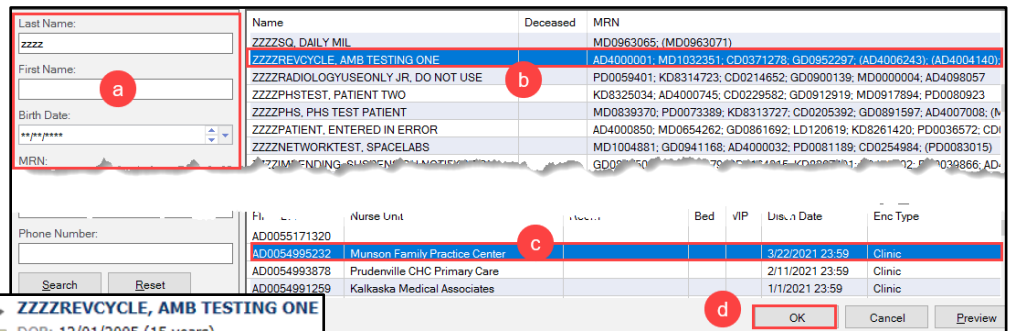
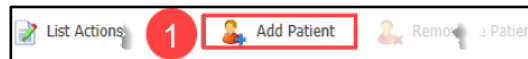
Note: If a patient qualifies for multiple lists, the ranking is specific to each list and will not be shared across other lists. To remove a ranking, click on the left of the first ranking circle and ranking will be cleared.

Note: The Add Patient button is only available after at least one worklist has been created.

Adding or Removing Patients

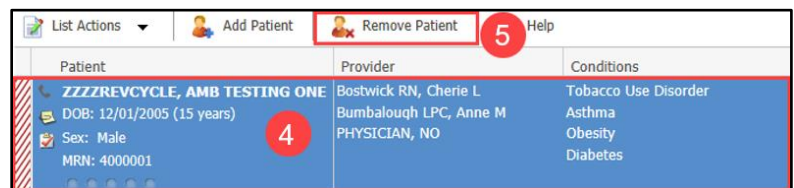
To add a patient:

1. **Click** Add Patient from the Worklist.
2. **Search** for patient:
 - a. Last Name, First Name, Birth Date.
 - b. **Click** correct patient.
 - c. **Click** appropriate encounter.
 - d. **Click** OK.
3. Patient is added to Worklist.



To remove a patient:

4. **Highlight** patient from Worklist.
5. **Click** Remove Patient.



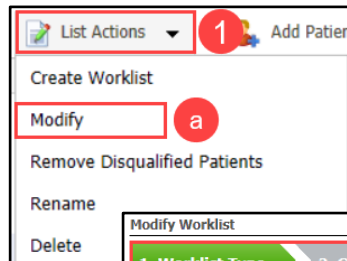
Note: Only patients that no longer meet search criteria can be removed from the worklist.

Note: Always remove patients from a custom list when there is no longer a need. For example: the patient is discharged, assigned to a different person, or shift change.

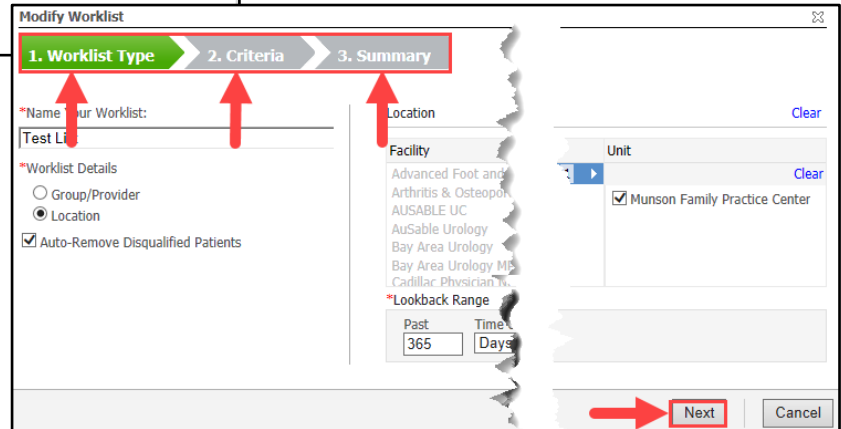
Modifying Lists

To modify a list:

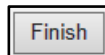
1. From the List Action menu:
 - a. **Select Modify.**



2. From the Modify Worklist:
 - a. **Select** the modifications and **click Next** to continue through the screens.

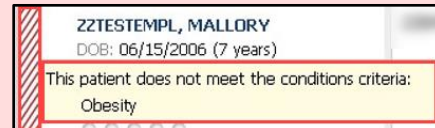


3. **Click Finish** to save the modified list.



Note: While in the Modify window, changing the list name will create a new list. If the list is saved with the same name, it will override the existing worklist.

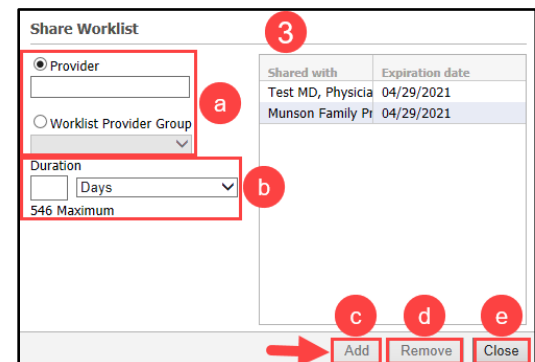
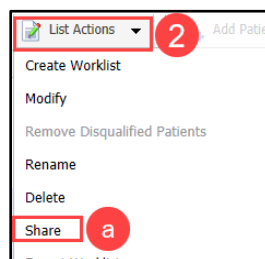
If any parameters were changed and the patient(s) no longer qualifies, the patient(s) will be noted with red and white lines. Hover to show details on why that patient no longer qualifies. At this time, a patient can be removed from the list.



Sharing Lists

To share a list:

1. Open the appropriate Worklist.
2. Click List Actions:
 - a. Click Share.
3. Share Worklist will display:
 - a. Select which Provider or Worklist Provider Group that the list should be shared with.
 - b. Enter the duration.
 - c. Select Add to share the list.
 - d. If a shared list needs to be removed, follow the same steps, but **select Remove**.
 - e. **Click Close**.

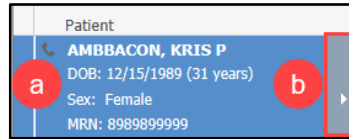


For the Share ability to be performed, a worklist must have been created. This shared worklist will display in the dropdown in the top left of the Dynamic Worklist window.

Creating Worklist Reminders

To create a Worklist reminder:

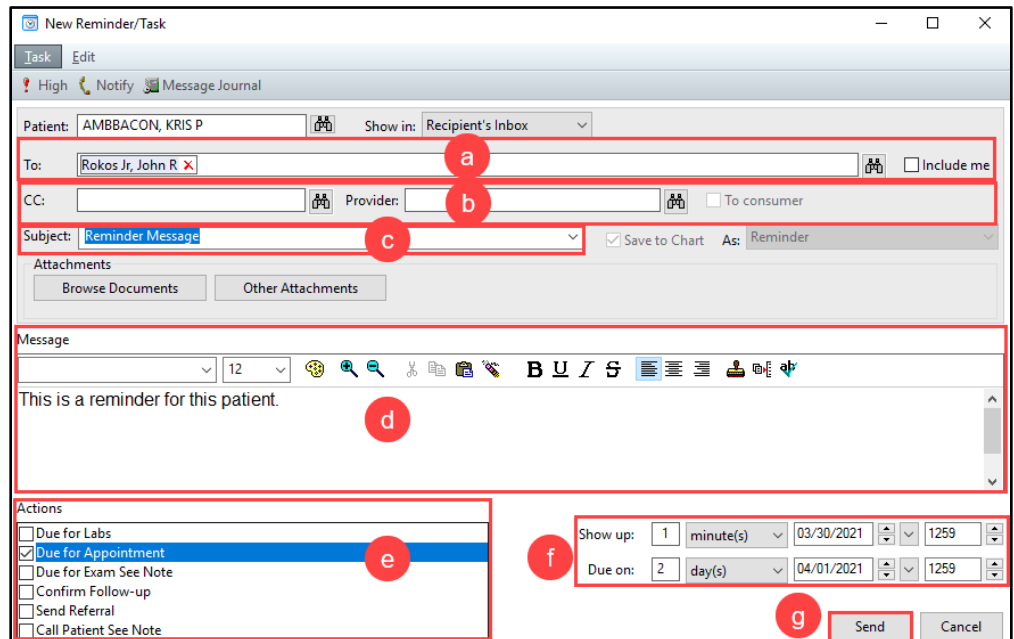
1. From the Worklist:
 - a. Highlight the patient's name.
 - b. Click the arrow to expand.



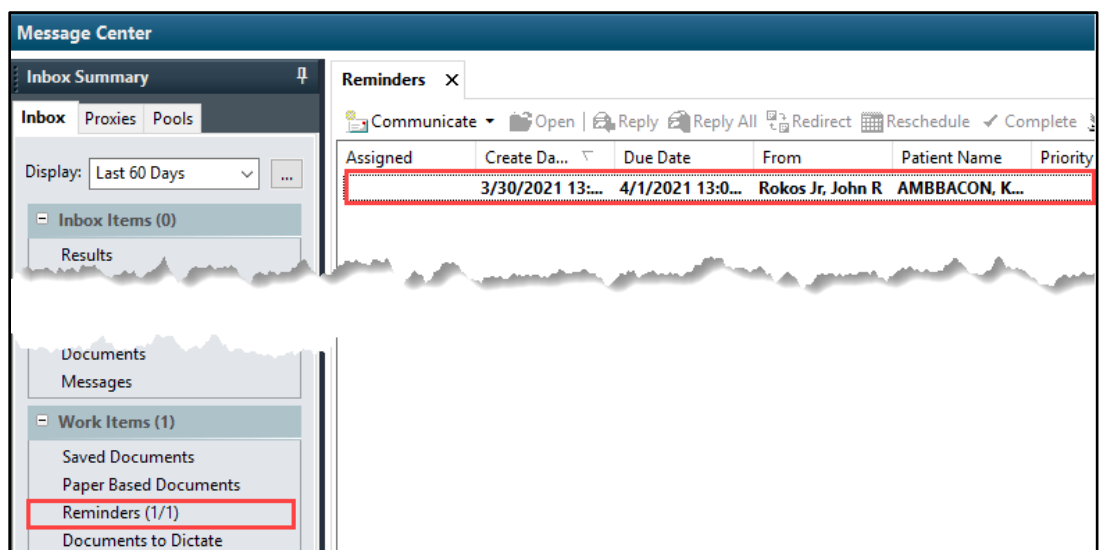
2. **Click** Create Reminder.
3. From New Reminder/Task:



- a. **Enter** To:
- b. **Enter** a CC: or Provider if appropriate.
- c. Subject will default to: Reminder Message.
- d. **Type** or copy/paste body of the message.
- e. **Click** appropriate Actions.
- f. **Select** a Show up or Due on timeframe.
- g. **Click** Send.



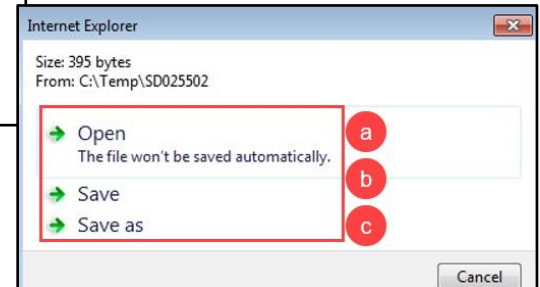
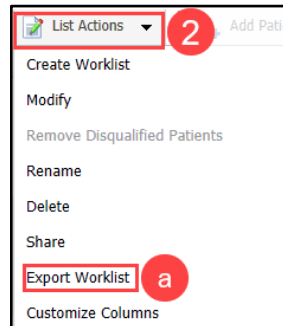
4. Reminder will display in Message Center.



Exporting Lists

To export a list:

1. **Open** the appropriate Worklist.
2. **Click** List Actions:
 - a. **Click** Export Worklist.
3. **Click** on one:
 - a. Open:
 - i. File will open, but not save.
 - b. Save:
 - i. Save locally or a shared network folder.
 - c. or Save as:
 - i. To change name and save locally or to a shared network folder.

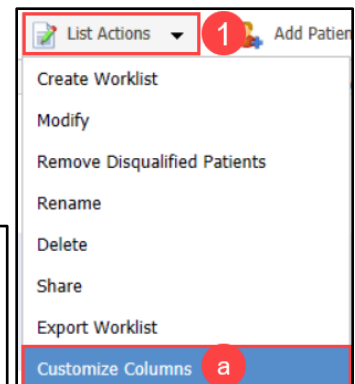
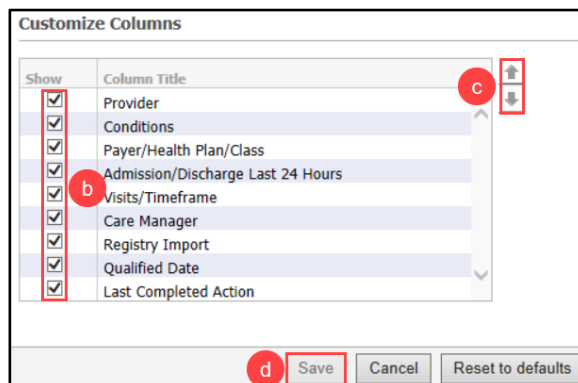


Customizing

Users can customize the worklist columns to their preference.

To show/hide and rearrange columns:

1. From List Actions:
 - a. **Click** Customize Columns.
 - b. **Click** or Unclick Show.
 - i. This will display or hide the column title.
 - c. Use Up/Down arrows to sequence.
 - d. **Click** Save when finished.



NOTE: Clicking Reset to defaults will revert to system default settings.