What is a patient list and why do I need it?

It is important to make a plan even before beginning to collect data and seeing patients for pre-rounding. Take a moment to plan the steps you want to follow when pre-rounding and identifying which patients may need more focus. The EHR is just a huge database of patients and patient lists define a subset of patients that are filtered based on a certain purpose or need. Some EHRs allow different patient lists to display different data. A patient list is like a spreadsheet which provides you with a high-level overview of your patients. Every patient is a row of data and every column shows a specific category of information. Like a spreadsheet, the patient list often can even be sorted by the contents of the column, such as age or location. When you sign into your EHR, you will see some pre-existing patient lists, which are populated automatically by admin-created filters. These lists will update automatically based on the changes made to a patient’s chart. The other type of lists are those that can be created manually. These lists are curated by users when no automatic list exists to serve their purpose. Users can select individual patients to create these lists.

Advantages of patient lists

- It filters through all the patient records in the EHR to find your patients.
- It provides high-level information for each patient included in the list, which can help you triage the level of urgency for reviewing each patient’s data during pre-rounding.

Tips

- Ask for help if you can’t find the right patient list or right configuration.
- Ask colleagues and supervisors for templates or shared lists that your team may be using for collaboration.
- Keep printouts of patient lists secure and dispose them correctly by shredding so that there are no HIPAA violations.
- Investigate patients who may disappear from your list suddenly without cause or if patients who are not under your care suddenly appear on your list.
- Do not enter a patient’s chart if they appear on your list but are not under your care unless you have a valid reason.
- Maintain your manual lists regularly and try to review and clean up your patient lists daily.