Creating Epic Patient Lists

1. From the red Epic drop-down menu in the upper right hand corner of your screen, select Patient Care and then from that submenu, select Patient Lists.

   **TIP:** After you have accessed Patient Lists, it will appear in your Epic drop-down menu in the “Recent” section. If you hover over Patient Lists there, you will see a push pin icon. You can click this icon to “pin” Patient Lists so that it always stays at the top of your Epic drop-down menu.

2. In the Patient Lists screen, click on the Edit List button in the top left of the screen.

   ![Patient Lists Screen]

   A drop-down menu will appear; select Create My List. A pop-up window will appear on your screen.
3. Type in a name for your list. Be as clear and concise as possible, so if others are looking for your list, they will be able to easily identify it. If you are making a patient list of those on controlled meds, name your list “(provider name) Controlled Meds.”

4. After typing in your list name, you can select the columns of patient information that you would like to appear in your list. There is a list to scroll through, but it is easier to type a search word into the Search window to find the items that you know you would like to include. For example: “MRN,” “DOB,” “Sex,” or combinations of information like “Name Full Age Sex.” Click on the patient information that you’d like included as a column on your list, then click Add Column. The column will then appear in the bottom window titled Selected Columns. Once you have selected all of the columns you need, click Accept. (Recommended columns for controlled med patient lists are “MRN” and “Name Full Age Sex.”)

5. You can change the order in which your columns appear by highlighting the column name in the Selected Columns window and then using the up and down arrows to move that column to a different position. If you have already accepted and created the list, you can always edit it by going to the Edit List button and then selecting Properties OR right clicking on your list name in the My Lists menu and selecting Properties.

6. Next you can add patients to your list. Click the Add Patient button. A Patient Lookup window will appear, where you can search for patients.
Once you have selected patients, they will appear in the list screen to the right and also in the My Lists menu to the left, under the list name.

7. You can sort your patients by clicking on the column labels.

8. If you want others to be able to view and/or manage your list, click on the Edit List button and then selecting Properties OR right click on your list name in the My Lists menu and select Properties. Click on the Advanced tab at the top of the window. Type user names into the search window and click the magnifying glass selection tool to find and select your users.
9. Select each user's desired Access Level by clicking on the selection tool in the box and selecting from the options that pop up. Options are by number, so if you have a lot of names, you can just type the number in the Access Level box to select it: 2 - View Only, 3 - Add/Remove Patients, 4 - Modify Properties, 5 - Change Accessibility, 6 - Delete Patient List. The creator of the list automatically has access to do all functions to the list. Each higher number item includes the access of the numbers below it (for example, 6 includes Add/Remove Patients, Modify Properties, Change Accessibility and Delete Patient List). For controlled med patient lists, it is recommended to add the provider, roome, tactical nurse(s), other roomers in pod/clinic, and other providers in pod/clinic. The provider and roomer should have at least level 5 access, and all others would just need level 2 access. After adding all users and access levels, click Accept.