

Setting and Viewing a Patient List in Care Compass

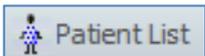
The first view in *CareCompass* is the multi-patient summary or *Organizer View*, which provides a dashboard view of multiple patient information and activities. A patient list will need to be created as a prerequisite to working with a patient through the *CareCompass Organizer View*.

CareCompass supports the following list types:

- Assignment (Ancillary)
- CareTeam
- Custom
- Location
- Medical Service
- Relationship

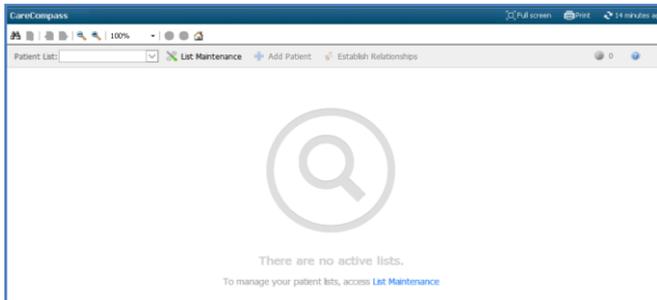
Creating a patient list

A patient list can be created by opening the *Patient Lists* window from the *ieMR toolbar*.

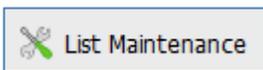


A patient list can also be created from the *CareCompass* opening screen.

To create a patient list from the *CareCompass* opening screen:



1. Click on the *List Maintenance* button



The *Modify Patient Lists* window will open. Refer to the *QRG Creating Patient List by Location* for full instructions on how to create a patient list.

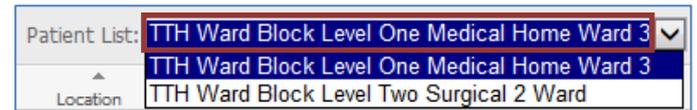
Displaying a patient list for use in CareCompass

When a patient list is created, it will be able to be accessed through the *CareCompass Organizer View*. Multiple patient lists are able to be loaded from this dashboard. Patient lists will display in the *CareCompass toolbar*.



To display a patient list in CareCompass:

2. Click on the Patient List drop down arrow



A list of existing patient lists will be displayed.

3. Select the relevant patient list

The selected patient list of names and locations will display.

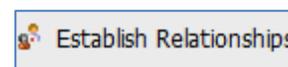
Location	Patient	Visit
--	060ALLIED, MARIYAH 67yrs FEMALE -- No Relationship Exists	--
--	061ALLIED, AVAH 67yrs FEMALE -- No Relationship Exists	--
--	062ALLIED, NOLA 67yrs FEMALE -- No Relationship Exists	--
--	063ALLIED, ILIANA 67yrs FEMALE -- No Relationship Exists	--
--	064ALLIED, CHANA 67yrs FEMALE -- No Relationship Exists	--
--	065ALLIED, CINDY 67yrs FEMALE -- No Relationship Exists	--
--	066ALLIED, JANIYA 67yrs FEMALE -- No Relationship Exists	--
--	067ALLIED, CAROLYN 67yrs FEMALE -- No Relationship Exists	--
--	068ALLIED, MARISOL 67yrs FEMALE -- No Relationship Exists	--
--	069ALLIED, MALIAH 67yrs FEMALE -- No Relationship Exists	--
--	070ALLIED, GALILEA 67yrs FEMALE -- No Relationship Exists	--
--	071ALLIED, KIANA 67yrs FEMALE -- No Relationship Exists	--
--	072ALLIED, MILANIA 67yrs FEMALE -- No Relationship Exists	--

Establishing a relationship

To view the most recent patient information, important details and documentation that are pertinent to patient care on this list view, a relationship must be established. It is possible to establish a relationship with a single or multiple patients.

Establishing a relationship with multiple patients

4. Select the Establish Relationships button on the CareCompass toolbar



The *Establish Relationship* dialog box will open.

Name	Sex	Date of Birth	MRN	FIN
<input checked="" type="checkbox"/> 060ALLIED, MARIYAH	FEMALE	30/06/1950	TTH 900060	176008
<input checked="" type="checkbox"/> 061ALLIED, AVAH	FEMALE	30/06/1950	TTH 900061	176009
<input checked="" type="checkbox"/> 062ALLIED, NOLA	FEMALE	30/06/1950	TTH 900062	176010
<input checked="" type="checkbox"/> 063ALLIED, ILIANA	FEMALE	30/06/1950	TTH 900063	176011
<input checked="" type="checkbox"/> 064ALLIED, CHANA	FEMALE	30/06/1950	TTH 900064	176012
<input checked="" type="checkbox"/> 065ALLIED, CINDY	FEMALE	30/06/1950	TTH 900065	176013
<input checked="" type="checkbox"/> 066ALLIED, JANIYA	FEMALE	30/06/1950	TTH 900066	176014
<input checked="" type="checkbox"/> 067ALLIED, CAROLYN	FEMALE	30/06/1950	TTH 900067	176015
<input checked="" type="checkbox"/> 068ALLIED, MARISOL	FEMALE	30/06/1950	TTH 900068	176016
<input checked="" type="checkbox"/> 069ALLIED, MALIAH	FEMALE	30/06/1950	TTH 900069	176017
<input checked="" type="checkbox"/> 070ALLIED, GALILEA	FEMALE	30/06/1950	TTH 900070	176018
<input checked="" type="checkbox"/> 071ALLIED, KIANA	FEMALE	30/06/1950	TTH 900071	176019
<input checked="" type="checkbox"/> 072ALLIED, MILANIA	FEMALE	30/06/1950	TTH 900072	176020
<input checked="" type="checkbox"/> 0065IMPATIENT, JACK	MALE	11/05/1977	TTH 500006	43831
<input checked="" type="checkbox"/> 0115ImpPatient, Ingrid	FEMALE	11/05/1948	TTH 500011	176105
<input checked="" type="checkbox"/> 0125ImpPatient, Verne	MALE	11/05/1944	TTH 500012	176106
<input checked="" type="checkbox"/> 0155ImpPatient, Carly	FEMALE	11/05/1975	TTH 500015	43859
<input checked="" type="checkbox"/> 0165ImpPatient, Mel	FEMALE	11/05/1971	TTH 500016	43860
<input checked="" type="checkbox"/> 0185ImpPatient, Roger	MALE	11/05/1959	TTH 500018	175851
<input checked="" type="checkbox"/> 0205ImpPatient, Kate	FEMALE	11/05/1948	TTH 500020	175853
<input checked="" type="checkbox"/> 0225ImpPatient, Frank	MALE	11/05/1940	TTH 500022	175855

5. Click on the *Relationship* drop down arrow
A list of relationships that a user can establish will be displayed.

* Relationship Registered Nurse

6. Select a relevant relationship

The *Relationship* field is mandatory. The *Establish* button will not be available for use unless a relationship is selected.

All patients within this list are checked by default. All patients on the list, or groups of patients within the list, can have a relationship established.

7. Choose one of the following actions to select patients within the list:
- *Select All*: selects all patients in the list
 - *Deselect All*: deselects all patients in the list
8. Ensure all required check boxes are selected next to the patients in the list

<input checked="" type="checkbox"/>	060ALLIED, MARIYAH	FEMALE
<input checked="" type="checkbox"/>	061ALLIED, AVAH	FEMALE
<input checked="" type="checkbox"/>	062ALLIED, NOLA	FEMALE
<input type="checkbox"/>	063ALLIED, ILIANA	FEMALE
<input type="checkbox"/>	064ALLIED, CHANA	FEMALE

9. Click on the *Establish* Establish button
A relationship is now established with the selected patients.

The selected patients' clinical details are updated with the most current information available.

060ALLIED, MARIYAH	67yrs FEMALE -- Allergies
061ALLIED, AVAH	67yrs FEMALE -- Allergies
062ALLIED, NOLA	67yrs FEMALE -- Allergies
063ALLIED, ILIANA	67yrs FEMALE -- No Relationship
064ALLIED, CHANA	67yrs FEMALE -- No Relationship

Establishing a relationship with a single patient

To establish a relationship with a single patient:

The *No Relationship Exists* No Relationship Exists link is displayed on each individual patient line when the patient list is created as above.

- Click on the *No Relationship Exists* link next to the required patient. The *Establish Relationship* dialog box will open displaying only the selected patient in the list.
- Click on the *Relationship* drop down arrow. A list of relationships that a user can establish will be displayed.
- Select a relevant relationship
- Click the *Establish* button

A relationship is now established with the selected patient. The individual patient's clinical details are updated with the most current information available.

Any patients that have had a relationship established are now *active* and displaying current clinical information from the CareCompass *Organizer View*. The patient/s are now highlighted in bold.

Patients that have not had a relationship established will show as *inactive* and continue to display the *No Relationship Exists* link until made active or removed from the list.

060ALLIED, MARIYAH	67yrs FEMALE -- Allergies
061ALLIED, AVAH	67yrs FEMALE -- Allergies
062ALLIED, NOLA	67yrs FEMALE -- Allergies
063ALLIED, ILIANA	67yrs FEMALE -- No Relationship Exists
064ALLIED, CHANA	67yrs FEMALE -- No Relationship Exists

Maintaining patient lists

Patient lists displayed in CareCompass can be maintained through the *List Maintenance* icon on the *CareCompass toolbar*.

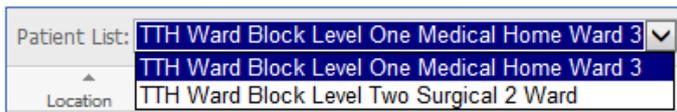
To add further lists to the *CareCompass Organizer View*:

- Click on the *List Maintenance* icon on the *CareCompass toolbar*

The *Modify Patient Lists* window will open.

- Continue to create a new, or select an existing, patient list

When the list is created it will appear as an option in the *Patient List* drop down menu.



- Alternate between lists in the drop down menu as required.

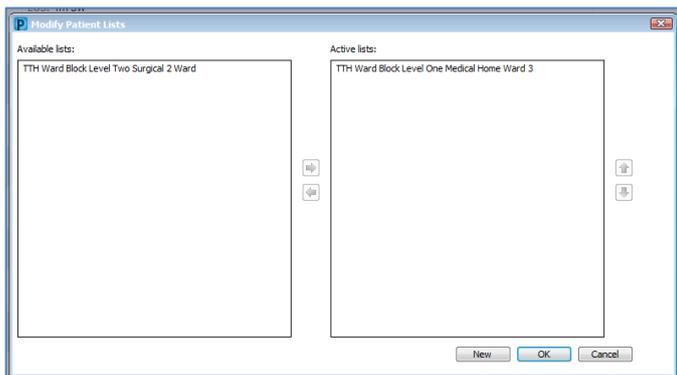
To delete a list from the *Patient List* drop down menu:

- Click on the *List Maintenance* icon on the *CareCompass toolbar*

The *Modify Patient Lists* window will open.

- Select any unwanted lists from Active Lists column

- Use the *across arrow*  to move the list into the *Available Lists* column



The selected list will now be removed from the *Patient List* drop down menu on the *CareCompass toolbar*.