**Custom Patient List**
Clinicians and providers can create a custom patient list to specify the patients on the list.

**Create a Custom Patient List**
1. Click **List Maintenance** on Patient List toolbar.  
   **NOTE:** List Maintenance is only available from Patient List on the Patient List Type toolbar.
2. Click **New** in Modify Patient Lists dialog box.
3. Click **Custom** in Patient List Type box.
4. Click **Next**.
5. Type **the name** of the Custom List at the bottom.
6. Click **Finish**.
7. Activate new custom list. Follow steps 2-4 of **Activate an Available List**.

**Activate an Available List**
1. Click **List Maintenance** on the Patient List toolbar.
2. Click **appropriate list** in Available Lists column.
3. Click blue right arrow.  
   **NOTE:** The list displays in the Active Lists column.
4. Click **OK**.

**Add Patient to a Custom Patient List**
**From Location List**
1. Click **desired Location List tab.** Examples: 5S, 7S, A2.
2. Right-click **desired patient’s name.**
3. Select **Add to a Patient List.**

**Remove Patient from a Custom Patient List**
**From Location List**
1. Open **desired custom list.**
2. Click **Add Patient** on Patient List toolbar.
3. Search for **desired patient.**
4. Click **desired patient’s name** to highlight.
5. Double-click **appropriate encounter** in bottom of box.
   **NOTE:** Verify the correct encounter is selected if there are multiple encounters.
6. Click **OK.**

**Location List**
A location list is a system-generated list of patients in a given location.

**Set up a New Location List**
1. Click **List Maintenance** on the Patient List toolbar.
2. Click **New** in Modify Patient Lists dialog box.
3. Click **Location** in Patient List Type box.
4. Click **Next**.
5. Click next to Locations.
Set up a New Location List (cont’d.)
6. Click ![next to desired facility](continue the text). Examples: Gettysburg Hospital, WellSpan Surgical Rehabilitation Hospital, and York Hospital.
7. Click ![for the second level of desired facility](continue the text).
8. Click desired location.
9. Click Finish ![Finish](continue the text).
   
   **NOTE:** The new list is in the Available Lists column.
10. Activate the new list. Follow steps 2 - 4 in Activate an Available List.

Delete Patient Lists
1. Click ![List Maintenance](continue the text) on the Patient List toolbar.
2. Right-click desired patient list in Available Lists column.
3. Click Delete Patient List.
4. Click Yes in the Delete Patient List box.
5. Click OK.

Edit a Patient List
1. Select desired patient list to edit.
2. Click Properties ![Properties](continue the text).
3. Select desired options to customize.
4. Click OK to finish.

Patient Access List
The Patient Access List (PAL) is a list of patients and tasks associated with them from a user-specified list and timeframe.

Initial Set up Patient Access List (PAL)
1. Click Patient Access List tab on the Patient List Type toolbar.
2. Select timeframe.
   a. From the Timeframe Selection box, click Select a Shift if needed to activate list.
   b. Select appropriate time.
   c. Click OK.
3. Select Patient List.
4. Click appropriate list from Available Patient Lists dialog box.
5. Click OK.
   OR
   Click New. Follow steps 2 - 10 of **Add New Location List**.
6. Establish a Relationship if prompted.

**NOTE:** To change list and timeframe, right-click the gray time bar and select Change Patient List or Change Timeframe.

**Get Support**
Please call the Help Desk at extension 15555, or if off-site, call 851-5555 or 1-800-682-9657.