

How to Create a Criteria Based List Based on Location

Note: There are three types of patient lists: **Temporary**, **Criteria-Based**, and **Special**.

- A **Special List** contains the patients that you specify. For example, the patients you care for on a specific protocol. **Special Lists** display with an asterisk (*) in the **Current List** field. You must maintain and manually update this list.
- A Criteria-Based List may be based on your role, location, providers, service, or visit status.
- A **Temporary List** is created by you when using the **Find Patient** icon, and is not saved when you log off.

The steps below outline how to create a Criteria-Based patient list based on location.

1. From the Menu Bar, select File, then Maintain List, then New.

	Find Patient Find Visit	/ (Q [दे 🔋 🕑 🏌	* 🖋		3 🔒	I 😪 🛃 🥸	0 ×	₽↓		*	\$ 🗐	Ø
Maintain List Print Reports Re-Print Orders Scheduled Reports		New Modify Save Selected Patients		NITIS	43-01-70-5 / 070703208799 Luxenberg, Steven					Prot 90-CC-0168			6y5n DOB:
	Grant Chart Access Suspend Session	Patient <u>I</u> n	Into Summary Documents Flowsheets Clinical Summary Selected Patients										
	Logoff Patient Name		Assigned Location	Visit Type	Visit Stat	Temporary Location	Provider	Check Orde_	Flag New	Unack Alerts	New Resul	New Orders	
	NIHCCTEST, PATIENTBI	OPD	CC-CADRE	Inpatient	ADM								
	NIHCCTEST, PATIENTB	MC MIS	CC-CADRE	Inpatient	ADM		Martinez, Pedro E						
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The Client Selection Criteria window will display.

2. Select the **Location** tab.



3. Select the Include patients at selected locations only radio button.



4. In the Available Locations field, select the plus sign (+) next to NIH/CC+CRC.



5. Select the plus (+) sign next to **CC-Inpatient Units**.



6. Select the desired unit from the list in the **Available Locations** field. Click **Add**. The unit will display in the **Selected Locations** field.



7. Click OK.

The Name dialog box will display.



8. Type the name of the unit you have selected in the List Name field.

Client Selection Criteria	×
Your Role Location Providers Service Visit Status	
O Include patients at any location.	
C Include patients at logon location only.	
Include patients at selected locations only.	
Availa Name	
What name do you want to give to your new list?	
List Name: 1NW	
OK Cancel Help	
Add > < Remove	
OK Cancel Help	

- 9. Click **OK**.
- 10. The name of the unit will now display in the **Current List** field, along with a listing of all the patients currently assigned to that unit.

Patient List	<u>D</u> rders	<u>R</u> esults	Patient <u>I</u> nfo	<u>S</u> ummary	Documents	Flowsheets	Clinical	Summary	
Current List:	1NW)			•	Select All P	atients	11 Visit(s)	Save Selected Patients