



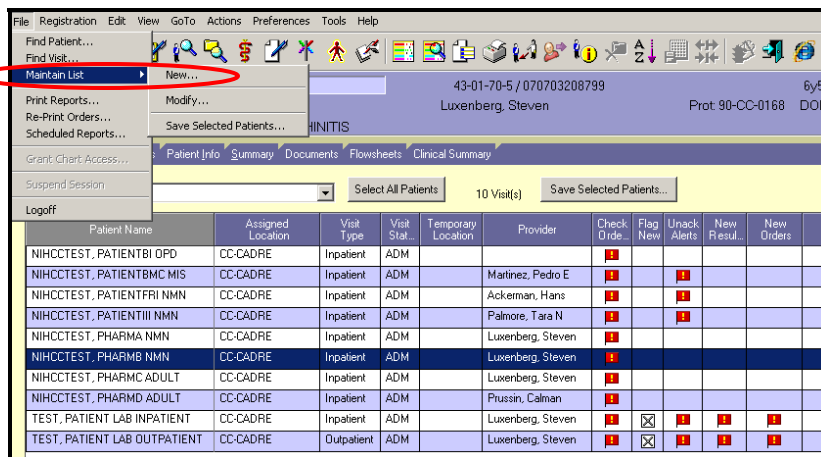
How to Create a Criteria Based List Based on Location

*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.

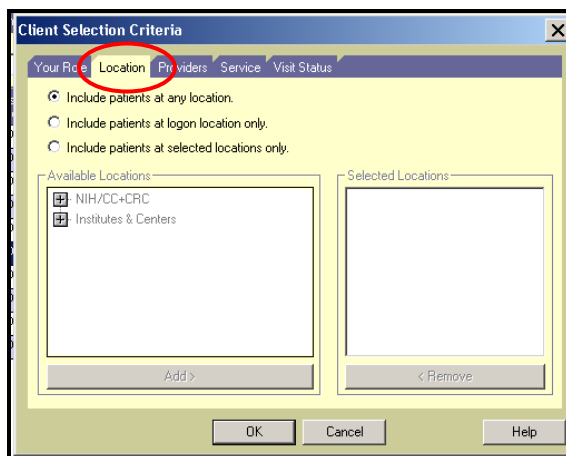
The steps below outline how to create a **Criteria-Based** patient list based on location.

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

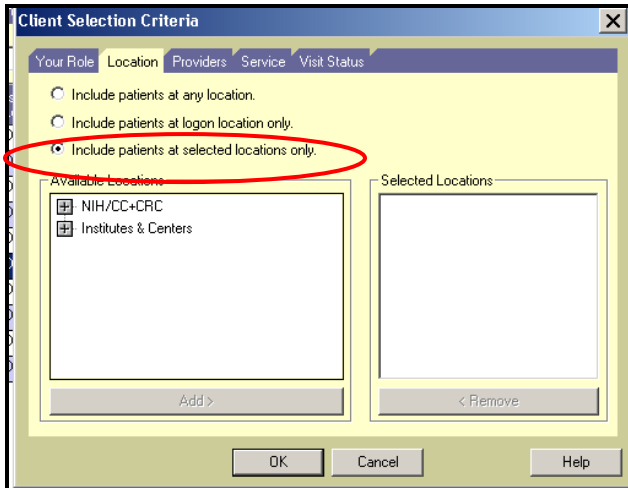


The **Client Selection Criteria** window will display.

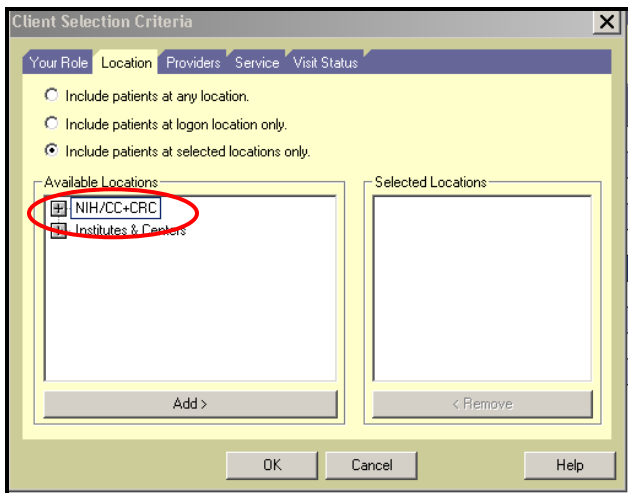
2. Select the **Location** tab.



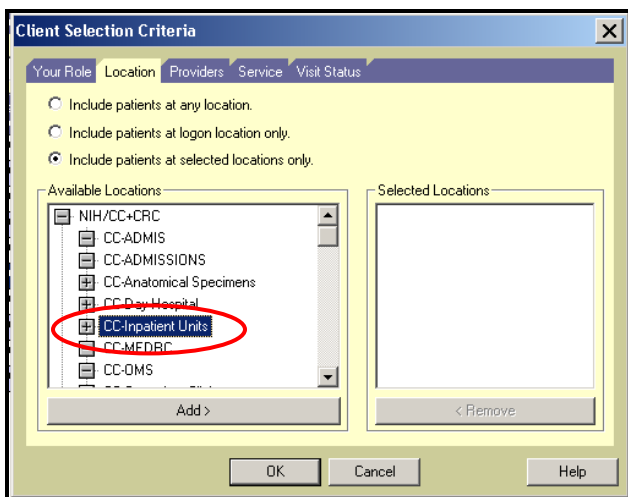
3. Select the **Include patients at selected locations only** radio button.



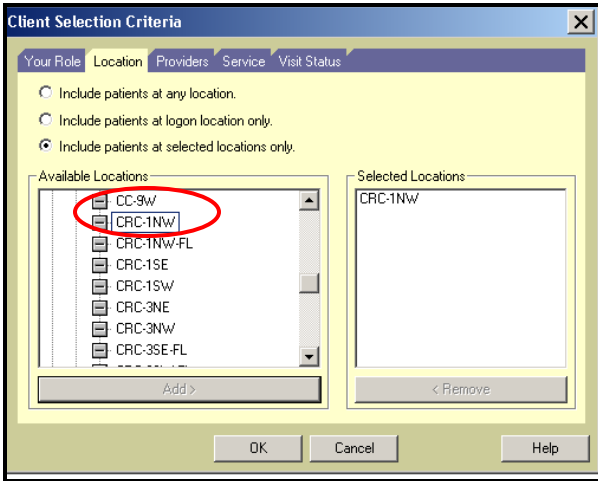
4. In the **Available Locations** field, select the plus sign (+) next to NIH/CC+CRC.



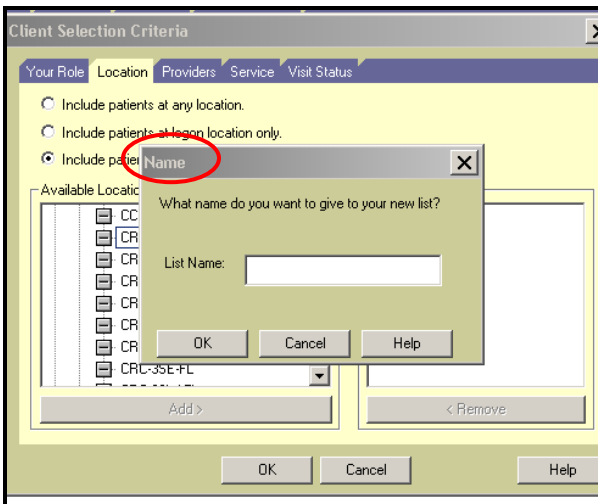
5. Select the plus (+) sign next to **CC-Inpatient Units**.



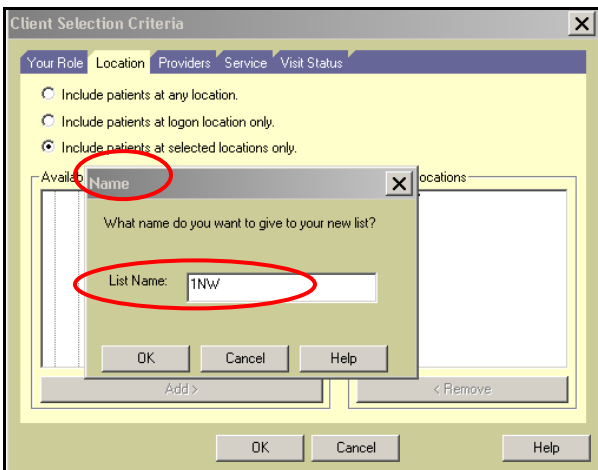
6. Select the desired unit from the list in the **Available Locations** field. Click **Add**. The unit will display in the **Selected Locations** field.



7. Click **OK**. The **Name** dialog box will display.



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



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.

