



Create Custom Lists

Version 4

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Create Custom Lists

Contact the ORCA Education team if you have any questions about this material by calling the Help Desk at 543-7012 or sending an e-mail to mcsos@u.washington.edu. Please specify which facility you are associated with.

ORCA Education Website: www.orcaed.washington.edu.

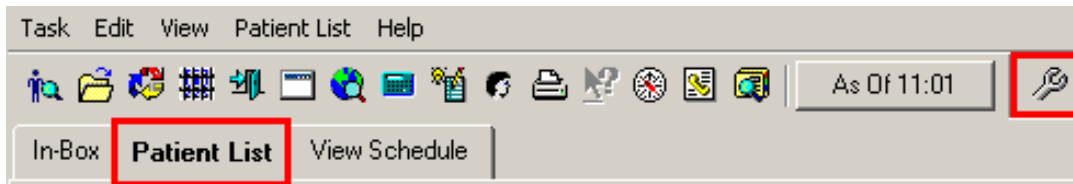
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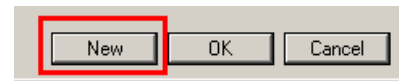
Lists

Create Custom List

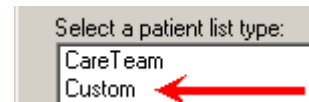
Custom lists can be created to track a specific group of patients.



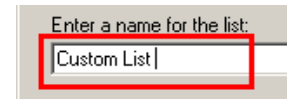
1. Click the **Patient List** tab
2. Click **List Maintenance** icon (wrench)
3. Click **New** at the bottom of the **Modify List** pane



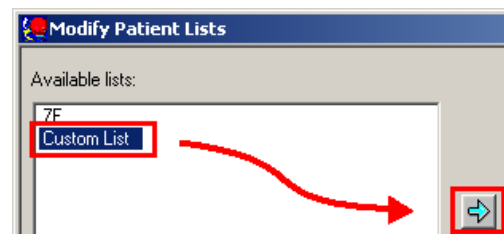
4. Select **Custom**
5. Click **Next**



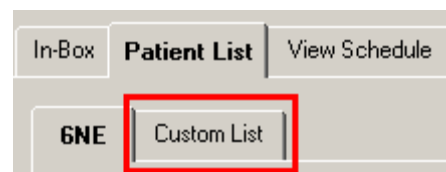
6. Type list name in **Enter a name for the list** field



7. Click **Finish**
8. Select the new list from the **Available lists** pane
9. Click **right arrow** to move list to **Active lists** pane
10. Click **OK**



Note: A new tab now displays under patient list

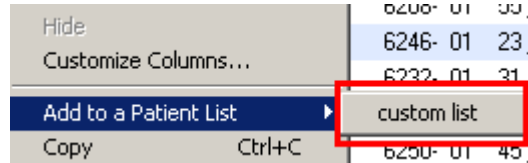


Transfer Patient from Service List to Custom List

1. Open **Medical Service** or **Location** List
2. Select patient name on the list

Note: Hold down the control key to select more than one patient name.

3. Right-click patient name
4. Select **Add to a Patient List**
5. Select a **list**



Note: You may need to refresh the custom list for the name(s) to appear.

Add Patient to a Custom List from Open Patient Record

6. From a patient's chart, click **Task** on the menu bar
7. Select **Add Patient to a Patient List**
8. Select a **list**
9. Click **Open Organizer** icon to return to the Patient List tab
10. Select your custom list and refresh



Add Patient to a Custom List from the List tab

1. Select the desired patient list
2. Click **Add Patient** button (yellow star-man)
3. Type **Patient Name** or **MRN** into the **Patient Search** fields
4. Click **OK**



Add Patient Icon

Remove Patient from Custom List

1. Select patient name
2. Click **Remove Patient** icon (the red X-man)

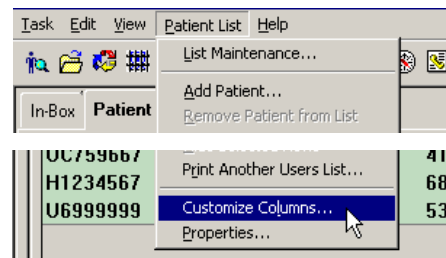


Note: This can only be done on a custom patient list.

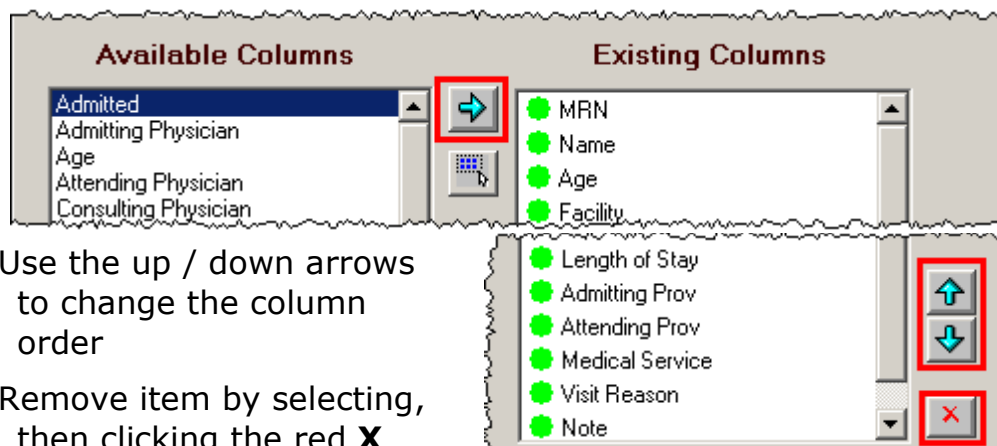
Customize Patient List Columns

This customization needs to be done for each list.

1. Select desired patient list
2. From the **Patient List** menu, select **Customize Columns** or
Right-click within the list to access the menu



3. Select item to add from **Available Columns** pane
4. Click arrow to move to **Existing Columns** pane



5. Use the up / down arrows to change the column order
6. Remove item by selecting, then clicking the red **X**
7. Click **Save** button (floppy disk) to save changes
8. Click **X** to close window



Note: If you forget to save your changes, a pop up reminder will prompt you.