

# EPR Core and Clinical Documentation Foundation

## How to Create a Special List

### Quick Reference Guide

This **Quick Reference Guide (QRG)** provides instructions on how to create a **Special List** in **Electronic Patient Record (EPR)**.



**Note:** The **Patient List tab** is the default tab when you first log in to **EPR**. Patient lists allow sorting and organizing patients into different types. However, in some circumstances, grouping certain patients by location and visit status (especially in areas not using Clinical Documentation), the **Patient List** features may be beneficial, as patients can be added to these lists manually or based on specific user criteria.

There are three types of patient lists in **EPR**:

- ❖ **Temporary Lists**
- ❖ **Special Lists**
- ❖ **Criteria-Based Lists**

**Special Lists** are custom lists you create using patients from your **Temporary List** or **Criteria-Based List**.

Unlike **Temporary Lists**, which are removed when you log out, **Special Lists** are saved and remain available the next time you log in. These lists function as working or tracking lists, allowing you to organize and monitor specific groups of patients based on your workflow needs.

#### How You Can Identify a Special List?

You can identify a **Special List** because its name begins with an **asterisk (\*)**.

For example:

- \*My Patient List for Follow-Up
- \*Discharge Patient List from Last Week

**Note:** This asterisk(\*) indicates that the list is user-created and will remain available in future logins until you delete it.

# EPR Core and Clinical Documentation Foundation

## How to Create a Special List

### Quick Reference Guide

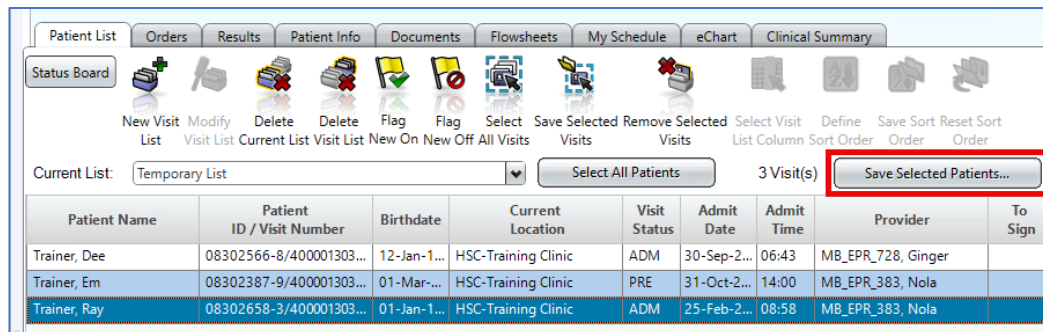
#### How to Create Special Lists

##### Find Patient

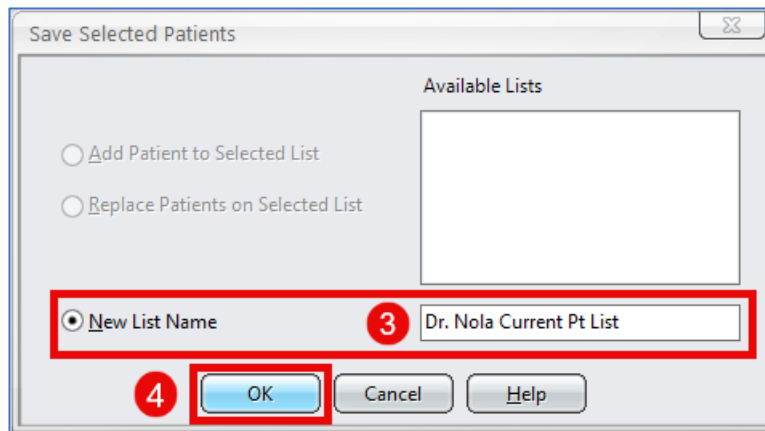
1. <Refer to EPR Overview Video>

##### Special List

- Highlight the patient(s) you are wanting to add to a **Special List**
  - To highlight multiple patients, hold down the Ctrl key and select the patients with your mouse. As they are selected, they will highlight in blue
- Click on **Save Selected Patients**



- Type a name for the **Special List**
- Click on **OK**

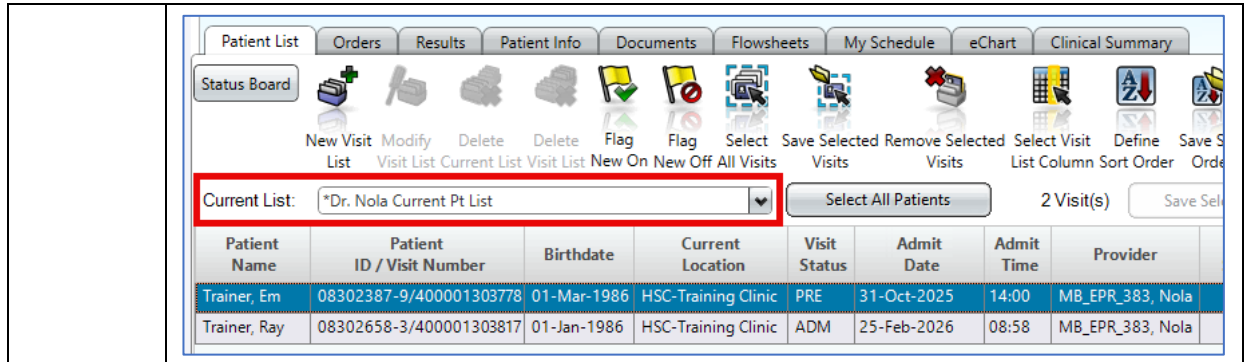


- The **Special List** you created will now appear in the **Current List** drop-down in the **Patient List** tab

# EPR Core and Clinical Documentation Foundation

## How to Create a Special List

### Quick Reference Guide



The screenshot shows the EPR interface with a patient list. The 'Current List' dropdown menu is highlighted with a red box and contains the text '\*Dr. Nola Current Pt List'. Below the dropdown is a table of patient data.

Patient Name	Patient ID / Visit Number	Birthdate	Current Location	Visit Status	Admit Date	Admit Time	Provider
Trainer, Em	08302387-9/400001303778	01-Mar-1986	HSC-Training Clinic	PRE	31-Oct-2025	14:00	MB_EPR_383, Nola
Trainer, Ray	08302658-3/400001303817	01-Jan-1986	HSC-Training Clinic	ADM	25-Feb-2026	08:58	MB_EPR_383, Nola