

EPR Core and Clinical Documentation Foundation

How to Create a Temporary List

Quick Reference Guide

This **Quick Reference Guide (QRG)** provides instructions on how **Temporary Lists** are created in **Electronic Patient Record (EPR)**.



Note: The **Patient List** tab is the default tab when you first log in to **Clinical 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**:

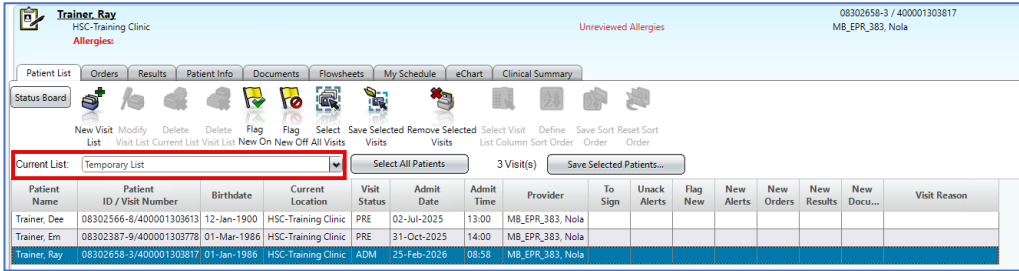
- ❖ **Temporary Lists**
- ❖ **Special Lists**
- ❖ **Criteria-Based Lists**

Temporary Lists are automatically created by the system when you perform searches for patients or patient visits.

These lists are intended for short-term use and are not saved when you log out.

If you want to retain the patients identified during your search, you must add them to a **Special List**, which is a permanent list you create and manage.

How to Create Temporary Lists

Find Patient	1. <Refer to EPR Overview Video>																																																																
Temporary List	<p>1. The patient(s) will be automatically added to the Temporary List in the Patient List tab</p>  <table border="1"> <thead> <tr> <th>Patient Name</th> <th>Patient ID / Visit Number</th> <th>Birthdate</th> <th>Current Location</th> <th>Visit Status</th> <th>Admit Date</th> <th>Admit Time</th> <th>Provider</th> <th>To Sign</th> <th>Unack Alerts</th> <th>Flag New</th> <th>New Alerts</th> <th>New Orders</th> <th>New Results</th> <th>New Docu...</th> <th>Visit Reason</th> </tr> </thead> <tbody> <tr> <td>Trainer, Dee</td> <td>08302566-8/400001303613</td> <td>12-Jan-1900</td> <td>HSC-Training Clinic</td> <td>PRE</td> <td>02-Jul-2025</td> <td>13:00</td> <td>MB_EPR_383, Nola</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Trainer, Em</td> <td>08302387-9/400001303778</td> <td>01-Mar-1986</td> <td>HSC-Training Clinic</td> <td>PRE</td> <td>31-Oct-2025</td> <td>14:00</td> <td>MB_EPR_383, Nola</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Trainer, Ray</td> <td>08302658-3/400001303817</td> <td>01-Jan-1986</td> <td>HSC-Training Clinic</td> <td>ADM</td> <td>25-Feb-2026</td> <td>08:58</td> <td>MB_EPR_383, Nola</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Patient Name	Patient ID / Visit Number	Birthdate	Current Location	Visit Status	Admit Date	Admit Time	Provider	To Sign	Unack Alerts	Flag New	New Alerts	New Orders	New Results	New Docu...	Visit Reason	Trainer, Dee	08302566-8/400001303613	12-Jan-1900	HSC-Training Clinic	PRE	02-Jul-2025	13:00	MB_EPR_383, Nola									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								
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