

Criteria-Based Patient Lists

Quick Reference Guide

This **Quick Reference Guide (QRG)** provides an outline of important information regarding **Criteria-Based Lists**.



Important Notes: Criteria-Based Lists are generated using selected filters, e.g., client selection criteria, to display specific data in your patient lists. For example:

1. Your Role

- Must be logged in as an assigned **Care Provider/Prescriber**.
- Lists show patients linked to that role.

2. Location - Filter by the patient's assigned location.

- A single area
- Multiple locations
- Entire hospital

3. Prescriber Roles - Available filters:

Attending, Admitting, Consulting, Emergency, Ordered, Primary Care and Referring Prescribers

4. Service - Filter by the patient's assigned **Service/Sub-Service**, e.g., Medicine, Surgery, or Pediatrics.

5. Visit Status - Choose which visit types to include:

- Pre-registered
- Admitted
- Discharged
- Optional: filter by date range or specific dates

Additional Notes:

- The lists you create are private; only you can view them.
- Currently, program-level lists (e.g., Medicine and Surgery) cannot be created. This is because the system only allows selecting one Service/Sub-Service at a time (e.g., Medicine → A Medicine or Medicine → A Non-Teaching Med).
- To capture all patients in a program, lists must be organized by unit, not by service. For example, to list all Medicine patients, you would create separate lists for:
 - 1) Medicine inpatient units
 - 2) Medicine step-down or overflow units
 - 3) Any specialized Medicine areas