

## How to Create a Criteria-Based List of Discharged Patients'

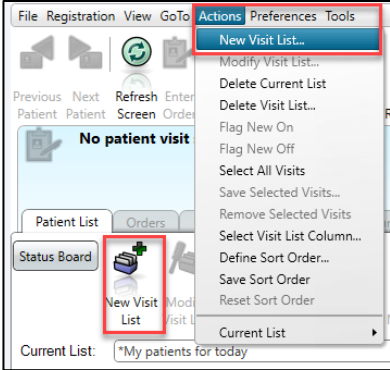
### Quick Reference Guide

This **Quick Reference Guide (QRG)** provides step-by-step instructions for creating a discharged patient list.



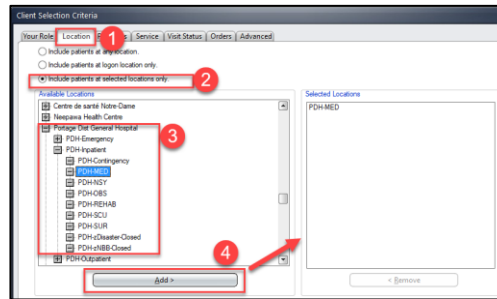
**Important Note:** When creating a **Discharge** list, you must include **Location** and **Visit Status**.

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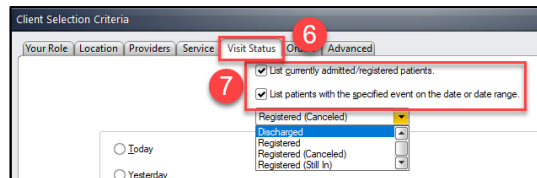
<p><b>Patient List</b></p>	<ol style="list-style-type: none"> <li>1. Navigate to the <b>Patient List</b> tab</li> <li>2. From the <b>Menu</b> bar, select <b>Actions</b></li> <li>3. Select <b>New Visit List</b></li> </ol>  <p>-OR-</p> <ol style="list-style-type: none"> <li>4. Select the <b>New Visit List</b> Icon</li> </ol> <p><i>The <b>Client Selection Criteria</b> window opens.</i></p>
<p><b>Add and Select Location(s)</b></p>	<ol style="list-style-type: none"> <li>1. Select the <b>Location</b> tab</li> <li>2. Click <b>Includes patients at selected locations only</b> radio button</li> <li>3. Scroll down and select the <b>+</b> icon beside the facility you want to create a list for</li> <li>4. Click the <b>+</b> icon beside the unit you want</li> <li>5. Click the <b>Add &gt;&gt;</b> button</li> </ol>

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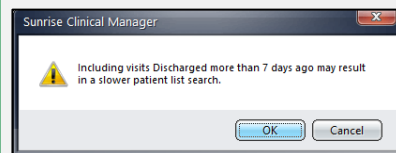
6. Select the **Visit Status** tab
7. Place a check mark on: **List patients with the specified event on the date or date range**



**Note:** The **Visit Status** drop-down is now active, allowing you to select **“Discharged.”** If you do not want to include admitted patient visits, make sure to unselect **“List currently admitted/registered patients”**.

8. Select a **Date Range** or **Use Actual Dates** (opens a calendar)
9. Click **OK** and name your list
10. Click **OK** again to save your changes

**Note:** You may receive a **Sunrise Clinical Manager** pop-up indicating **“Including visits Discharged more than 7 days ago may result in a slower patient list search.”**



This list is automatically updated by the system and will display entries from the current date back to the days leading up to the patient's discharge. By default, all care providers associated with this unit will appear on the list. If you prefer to view information for a single provider, open the **Providers** tab and select the specific care provider you want to filter by.