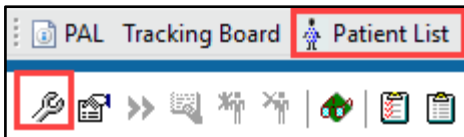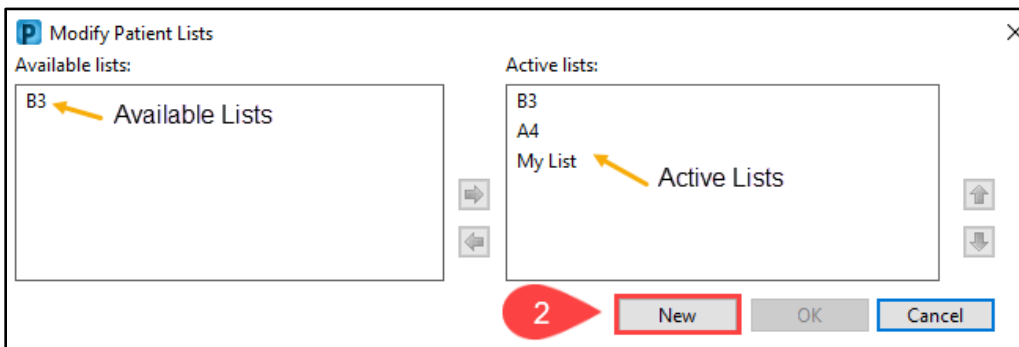## Creating a Custom List

A custom list is one that users can create which has the ability to add and remove patients.
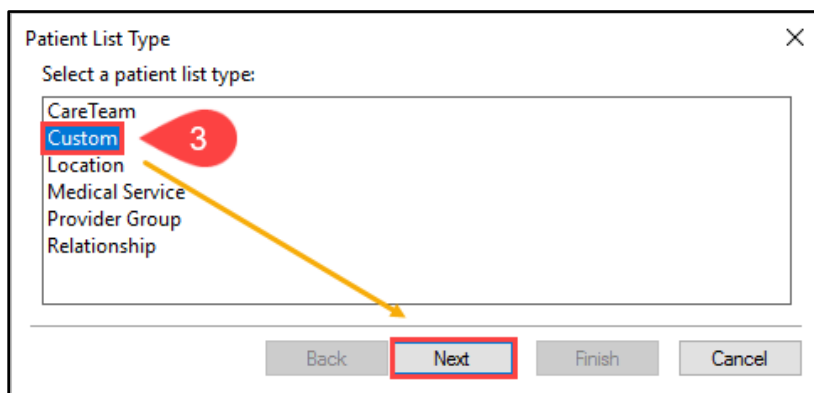
1. Login using your username and password. Select the patient list from the tool bar. Select the wrench.

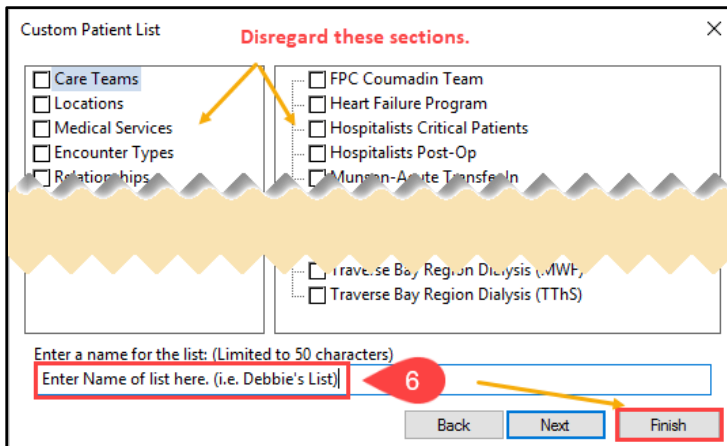2. To create a Custom list, click the "New" button, bottom right.

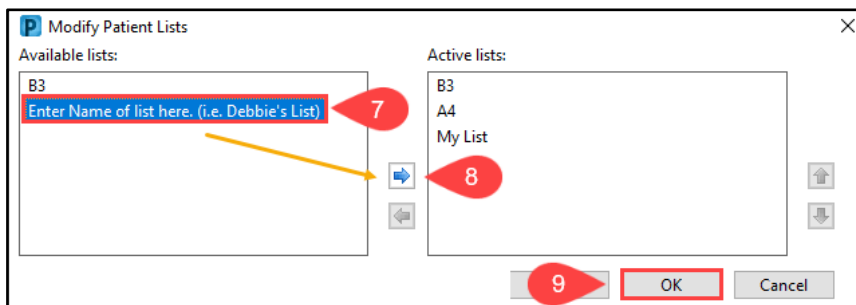3. Click on Custom, then Next.

4. The Custom Patient List window displays.
5. Disregard filter options.
6. Enter a name for the new list. Click Finish.

7. Return to the Modify Patient lists window where the new list is in the Available lists section. Click on the list name. This activates the arrow pointing to the right located between the two sections.

8. Click the activated arrow. The list name moves to the active lists section.
9. Click OK.
10. A new tab or list has been created.

Adding a Patient Using the Add Patient Button

1. From the Custom List, click the Add patient button on the Tool Bar.
2. Type in Patient Name, MRN, Account Number or other search criteria.
3. Find the patient's name in the list displayed.
4. Click the patient's name. Visits display in the lower portion of the screen.
5. Click the desired visit.
    a. It is important to select the correct encounter, so documentation occurs on the correct visit. Searching by the FIN number (account number) is the best way. It assures the correct visit is selected.
6. Click OK. Patient is added to the list.