

Capacity Management can be set-up to enhance the workflow for registration representatives. The three gadgets needed are: Transfer List, PreAdmit List, and Patient Lists. Set-up recommendations are outlined below.

## Custom Transfer List

Create Custom Lists to monitor **Current Location** and **Patient Type**.

**STEP 1:** Click the table icon and select **Add Custom List**.

- Enter a name to create a subfolder.

**STEP 2:** While on the new Custom List, click the table icon again to select **Filter/Sort Properties**.

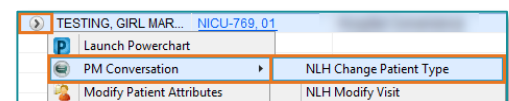
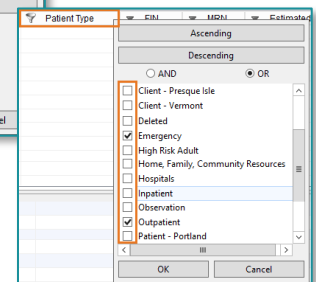
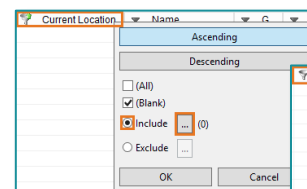
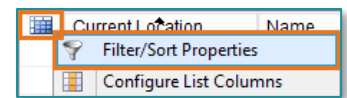
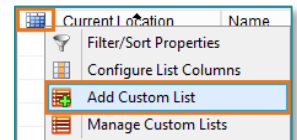
**STEP 3:** Click **Current Location** column header.

**STEP 4:** Uncheck **All** and select **Include** to activate the ellipsis button. Drill down to the **Desired Location** and place a check in the box.

**STEP 5:** Filter by **Patient Type** to highlight patients needing tasks performed.

### ➤ Change Patient Type

- Registration staff can access PM conversation through the drop-down list to the left of the patient's name.

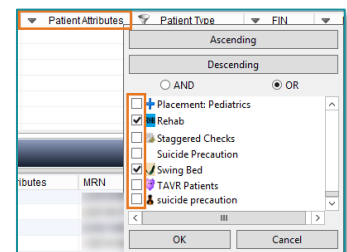


## PreAdmit List Filter

Patients coming from an outside location will appear on the **PreAdmit List**.

Filtering by **Patient Attributes** will highlight when Registration tasks are needed.

Select: Complete Registration; Patient Arrived: Rehab; Hospice; Swing.



## Patient List

Use **Global Search** on the **Patient List** gadget to search for patients.

