



Incoming patients being transferred through the Integrated Transfer Center (ITC) will be visible to Registration staff within Capacity Management. ITC staff will create a PreAdmit encounter and apply a Complete Registration attribute to the patient. Set-up recommendations for Registration staff have been outlined below.

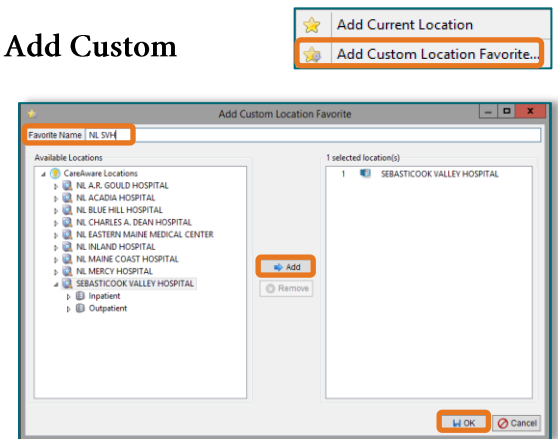
Add a Custom Location Favorite

STEP 1: Select the yellow star icon with the + sign  and select **Add Custom Location Favorite...** to open the Add Custom Location Favorite window.

STEP 2: Name the list in the **Favorite Name** field.

STEP 3: Select your hospital, click the **Add** button to move the location into the Selected Locations column, and select **OK** to save the location as a favorite.

- To view favorited locations, select the **Manage Location Favorites** icon .



Create a PreAdmit Custom List

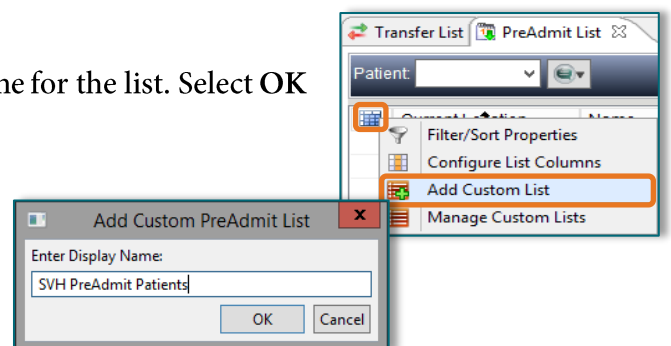
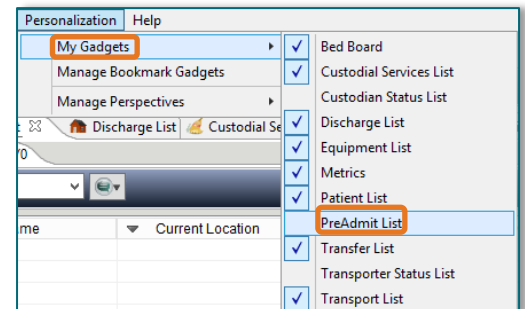
Once the Location Favorite has been saved, create a custom list within the PreAdmit gadget to view incoming patients.

STEP 1: To add the **PreAdmit List** gadget, navigate to the **Personalization** menu, hover over **My Gadgets**, and select **PreAdmit List**.

STEP 2: From the PreAdmit List, select the **List Properties** icon to display the menu.

STEP 3: Select **Add Custom List** and enter a display name for the list. Select **OK** to save the list.

- The custom list will be saved as a new tab within the PreAdmit List gadget.



Filter the Custom PreAdmit List

To view only incoming transfer patients, filters will be applied to the custom PreAdmit List.

STEP 1: From the previously created PreAdmit custom list, select the **List Properties** icon, and select **Configure List Columns**. A list of available columns will display, ensure the box next to **Patient Attributes** is checked.


- Once the box has been selected, click **Close** to return to the list.

STEP 2: To view patients with the **Complete Registration** filter, navigate to the **List Properties** icon, and select **Filter/Sort Properties** to turn on filters.

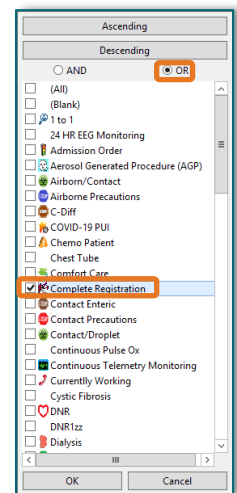
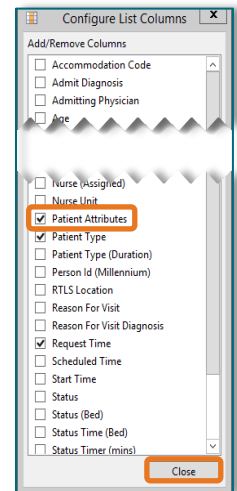
- Once filters have been turned on, arrows will appear next to each column header.

STEP 3: Select the **Patient Attributes** column header to display filtering options. By default, the **OR** option will be selected, and all attributes will be selected. To view only patients with the **Complete Registration** attribute, clear all attributes by deselecting the box next to **All**. All the previously checked boxes will clear.

STEP 4: Select the box next to **Complete Registration** attribute. Click **OK** to save selections.

- A filter icon will now display next to filtered columns,  **Patient Attributes**

NOTE: Additional attributes may be selected, as desired. To ensure patients are not excluded due to applied filters, confirm the radio button next to **OR** has been selected.



From the Office of Clinical Informatics

[Insert Title]

[Month Day, Year]

Page 3 of 3

For questions regarding process and/or policies, please contact your unit's Clinical Educator or Clinical Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.
