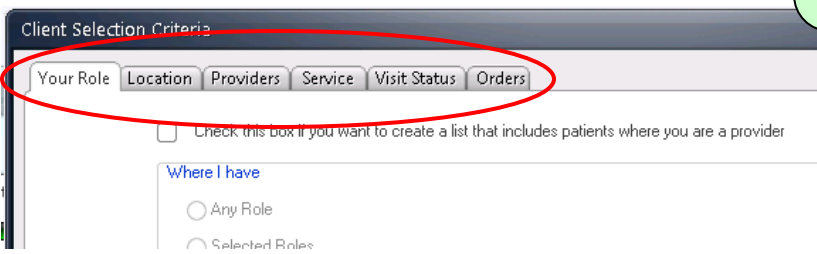
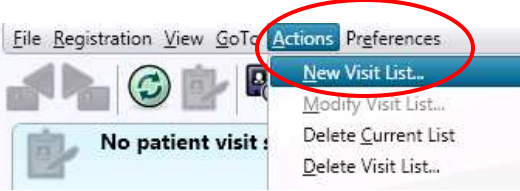


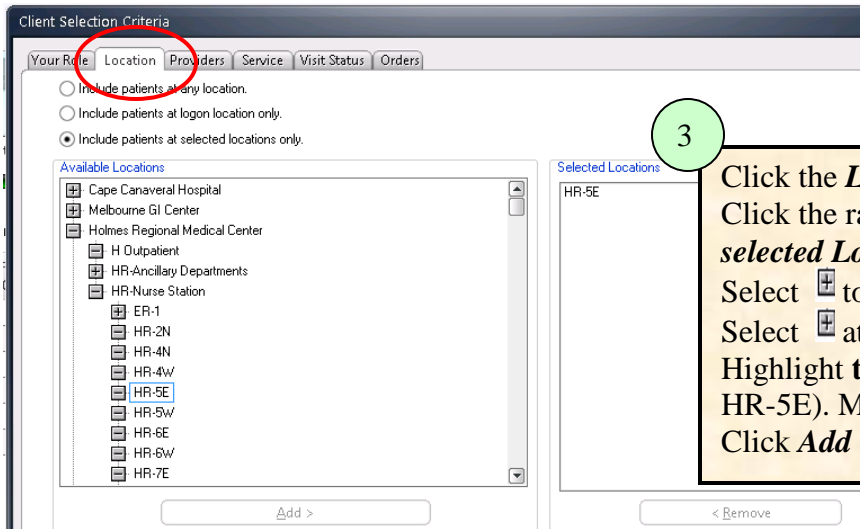
**Criteria-based lists (CBLs)** are lists for which you define the criteria to be used to generate a *patient list*. Criteria may include: provider roles, patient locations, providers, service, visit status, and/or *orders*. Orders Based Lists may be used by *Case Mgt, Rehab, WOCNs, Dietitians, IV Team, Cardiac Rehab, Clinical Research* and others to pull patients that have *active orders* for their unique services.



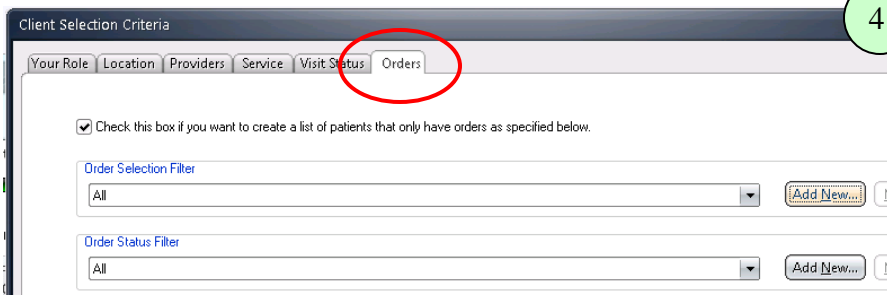
1  
Below the *Patient List* tab, click the *New Visit List* icon **OR** On the Menu, click *Actions-> New Visit List...*



2  
The *Client Selection Criteria* box will appear. This contains **6 tabs** that may be used to specify which criteria will be used to build the list.



3  
Click the *Location* tab  
Click the radio button *Include patients at selected Locations only*  
Select **+** to expand the Facility  
Select **+** at Nurse Station to list all.  
Highlight the **Nurse Station** you want (ex HR-5E). Multiple units may be chosen.  
Click **Add**



4  
The *Orders* tab allows you to choose the orders that will cause the patient to be included on your list.  
Click the **check box**, and then **Add New...** opposite *Order Selection Filter*

5

Enter a *Name* for your Order Filter.

**Add New Order Selection Filter**

Name: Case Management Orders

Description:

Order Selection  
 Order Browse  Order Item

Enter Order:

Orders

- Consent
- Consults
  - Consult Cardiology
  - Consult Case Management/Social Work**
  - Consult Internal Medicine
  - Consult Wound/Ostomy Nurse
  - Dietitian Consult
- Dialysis
- ED Order Sets
- ED Orders
- Endoscopy
- Laboratory

Selected  
 Consult Case Management/Social Work

Buttons: Add >, OK, Cancel, Help

6

Choose the *Orders* or *Order Categories* that you would like to generate the Criteria Based List. *These are different for different groups.* Click **Add** after each choice. Click **OK**.

7

The *Order Status Filter* can be used to filter down to Active or *Active and Pending* Orders only. Click **OK**.

**Add New Status/Priority Filter**

Name: Active & Pending Orders

Description:

Order Priorities: [All]

Statuses

- Any
- Orders Due to Expire in 0 Days
- Orders Pending Review in 0 Days
- Selected

Select one or more Statuses:

- Pending Verification Status 4
- Pending Verification Status 5
- Pending Verification Status 6
- Pending Verification Status 7
- Pending Verification Status 8
- Pending Verification Status 9
- Hold
- Pending**
- Scheduled
- Pending Collection
- Active**
- Active Clinical Pathway
- Active Master Order
- Auto Activate Status 10
- Auto Activate Status 11

Include Suspended Orders

- Both
- Only Suspended
- Only Not Suspended

Include PRN Orders

- Both
- Only PRN
- Only Not PRN

Include Discharge Orders

- Both
- Only Discharge
- Only Not Discharge

Include Conditional Orders

- Both
- Only Conditional
- Only Not Conditional

Buttons: OK, Cancel, Help

8

Ensure that your *Order Selection Filter* and/or *Order Status Filter* is set to the Personal Filter you recently created and click **OK**.

Check this box if you want to create a list of patients that only have orders as specified below.

Order Selection Filter  
 Case Management Orders

Order Status Filter  
 Active & Pending Orders

9

*Name* your new list and click **OK**. Now, whenever you log in to SCM, you will see only the patients who meet the **CRITERIA** that you set!