From the Office of Health Informatics

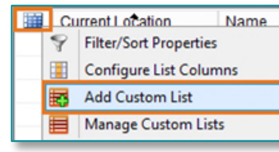
Capacity Management
Registration Custom List Workflow

June 27, 2025

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.

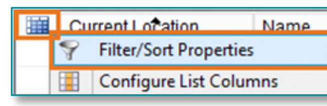
Custom Transfer List

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

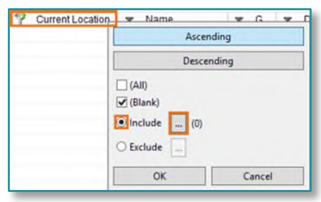


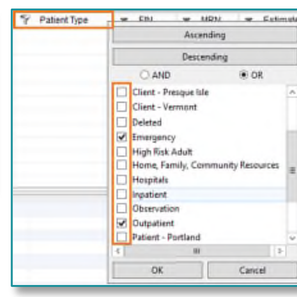
STEP 1: Click the table icon and select **Add Custom List**.

- 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.**





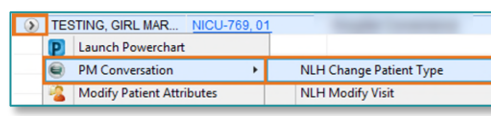
STEP 3: Click **Current Location** column header.

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.

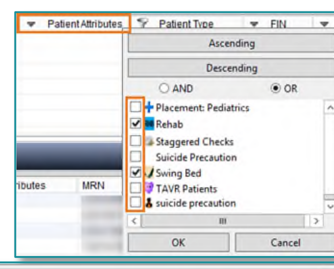
STEP 5: Filter by **Patient Type** to highlight patients needing tasks performed.

➢ **Change Patient Type**

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



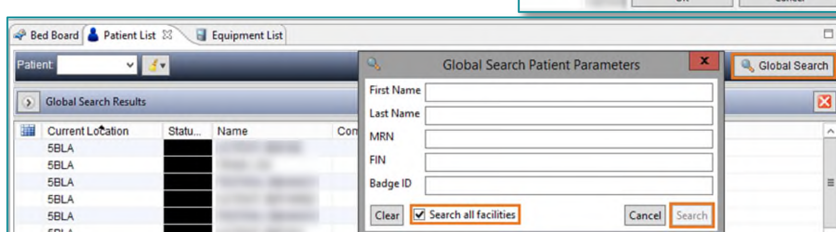
PreAdmit List Filter



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.



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