

CareAware Transfer Center

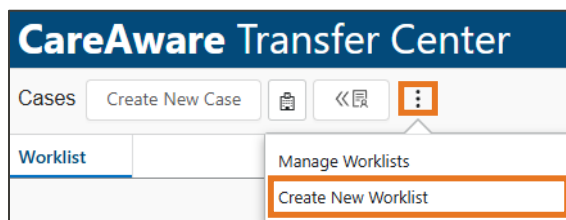
Custom Worklist

July 13, 2026

This guide outlines the steps required to create a custom worklist in the Transfer Center workspace. Custom worklists enable users to personalize their workspace by displaying only the information relevant to their responsibilities. Follow the instructions and screenshots provided to complete the setup process successfully.

Creating Custom Worklists

1. Log into Transfer Center Portal.
2. Select the **3-dot ellipsis**, then select **Create New Worklist**.



3. Name your Custom Worklist using ***Worklist Name**.
4. Check all options to include in the worklist and select **Next**.

NOTE: You can select up to 10 additional columns for the custom worklist.

5. **Manage Columns** to reposition the required and additional columns and select **Save**.

NOTE: Additional added columns can be removed, however Required Columns cannot be removed from the worklist.

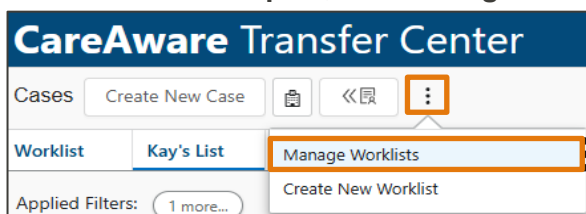
6. Select the **Filter** button and add filters as needed then select **Apply**.

NOTE: To build your custom list, choose from the **Filter Options** drop-down within the **Case Type**.

- **Acadia** specific work lists need to include all “**BH**” **case types**.
- **NLH locations**, non-Acadia, need to include all **case types** **without** “**BH**” in the title.
- Once Filters have been set, they stay as established within the worklist.
- Multiple worklists can be made and saved at one time.

7. Delete the general Worklist so that only your custom worklist is displayed. This allows you to focus on the information most relevant to your workflow.

- Select the **3-dot ellipsis**, then **Manage Worklists**.



- Select **Delete** next to the general **Worklist**.
- Select **Yes** on the **Alert Worklist Deletion**.
- Select **Save** to finish.

