How to: Creating Broadcast Patient Lists

Last Modified on 01/29/2025 3:36 pm EST

Creating a Broadcast List

Broadcast Lists allows you to create and manage customized patient lists for Broadcast communication. For example, you can create a list of patients in a certain age range to remind them to get this year's flu shot.

To get started, from **Menu > Home**, click **Broadcast** and go to the **Lists** tab. Here you will find your existing custom lists.

You can create a new one by clicking **+New List** in the top right corner.

Upon creation, the list will be marked as active by default but you can deactivate it by unchecking the checkbox at the top of the page.

Give the list a name and then select criteria to filter your patient list.

- **Age:** Patients can be filtered by age, in both years and months. This will be calculated based on the DOB in the patient's record.
- **Sex:** Lists can be created based on the patient's sex.
- **Add Additional:** If you have a specific list of patients' names, you can search for each patient to add to your custom list.
- **Filter:** Enter patient information to see if they are in the list based on your criteria. You can remove a patient by selecting the patient in the list and clicking 'Remove'.

When you are finished creating your list, click **Save**. The list will appear on the left side of the screen in the appropriate Active or Inactive dropdown based on how the list was setup.

If you want to edit a list, simply click on the list and click **Edit**.