

How to: Creating Broadcast Patient Lists

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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.

Edit Custom Broadcast List Cancel Save

Active

Title *
Flu Shot list

Age From: 0 Years Age To: 0 Years

Sex
 Male Female Other

Add Additional Individual Names Here
Search for a patient here...

Filter
Filter by first name Filter by last name Filter by email Filter by phone number

All Active Manually Added Removed

<input type="checkbox"/>	First Name	Last Name	Email	Home Phone	Cell Phone	Manually Added
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- **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'.

1 patient selected Remove Cancel

<input checked="" type="checkbox"/>	First Name	Last Name	Email	Home Phone	Cell Phone	Manually Added
<input checked="" type="checkbox"/>	Test	Fella				Yes

1 - 1 of 1 patient 1

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**.
