Item Favorites

Competency

Upon completion all users will successfully create and manage item favorites and effectively search for items using favorites lists.

Critical Behaviors

- Successfully add/edit favorite items.
- Understand how to search for items using a favorites list.
- Learn how to rename items from the chargemaster with a common name.

How much time will I need?

Who is the audience for this lesson?

This lesson is geared toward study team members who are responsible for creating billing calendars for their study.

What are the requirements?

Users will be required to complete an attestation asserting they have viewed and understood the material.
How to make a list of favorite or commonly used procedures.

How to Address Questions or Comments.
Double click on the same "Item Favorites" or single click on the icon in the Applications menu.
Content Expert: Paulina Radenbaugh

Navigation

- Add: Create a new list
- Copy: Make a duplicate of an existing list
- Edit: Make changes to an existing list
- Delete: Delete an existing list
- Exit: Close the Item Favorites module window
Creating a New List

Click on the “Add” button.
Creating a New List

Give your list a name and then click on the “Add User” button.
Adding a User

Check the box next to the name(s) you would like to have access to this list and click "OK". Don't forget to include yourself as a user!
Add Items to the List

- Click on the "Item Favorites" tab.
- Click on Manage Items.
Add Items to the List

- Use the filter to find your items and select them by double-clicking or using the “Add” button.
- Once you have located all of your items click “OK”.
- For more information on locating items and using the filter, please refer to our filtering module.
Rename Chargemaster Items

Provide a common name for an item by clicking in the “Common Name” column and typing an alternate name.

Common name appears in all Manage Items screens. Click on the column header to sort these items together.
Finishing Your List

Once you have all of your users and items click “Save”.
Adding Favorites from a Clinical Trial

Once you've created your list you can easily add additional items from your billing calendar in the Clinical Trials module. Right click on the service you want to add to bring up the menu and select "Add to Item Favorites".

Choose to which list you would like the item added and click "OK".

Click "OK" on the confirmation message.

Your new item will now be available in your list.
Accessing Your List

Items Favorite should be an available option in the Condition Builder of your filter. Double click on “Items Favorite.”

Select the check box next to the list you’d like to use and click “OK” to add it to your search criteria.
Accessing Your List

Select "OK" to search.

Now the items for your list should populate in the search results.
Questions and Comments

Additional information is available on our website at: http://www.med.umich.edu/u/medschool-crao/mbect.htm
Or by contacting the help desk at CRAO-MBECT-help@med.umich.edu or 734-764-KNOW (5669)