



## Contents

Overview.....	1
Automatic Waiting Lists.....	1
Manually Adding a Client to a Waiting List .....	1
Accessing a Waiting List (Automatic or Manual) .....	2
Accepting a Client on a Waiting List.....	2
Booking An Appointment from the Waiting List .....	3
Changing the Priority on a Waiting List .....	4
Removing from the Waiting List .....	4
Transferring a Client to a Different Waiting List .....	4
Accessing your Team's Waiting Lists .....	5
Viewing Clients on a Waiting List from the Team's Waiting List.....	6
Filtering a Waiting List.....	6
Understanding Red, Amber, Green (RAG) codes.....	7
Adding Waiting List Events .....	7
To record an End Date for an Event.....	8

## Overview

Waiting Lists are used by Services to manage their Client appointments. The Client will be added to a Waiting List until a suitable appointment becomes available. This also works for follow up appointments and ensures that all appointments are allocated fairly without omissions.

Waiting Lists can be either Automatic or Manual dependant on the service requirements.

## Automatic Waiting Lists

If the service has an Automatic Waiting List, when a referral is created for the Client, they will automatically appear on the waiting list. The Waiting List is also configured to either automatically or manually accept the Client.

Once the referral is added you can see the Automatic Waiting List that the Client has been added to.

Specialty	Care Setting	Team	HCP Referred To	Date & time referral received	Contact	To Discharge	RTT	Waiting List(s)
DIGITAL SKILLS TRAINING	Community and Clinic	DST Total Mobile Training		1 Jun 2023, 09:00	N		<a href="#">Transfer</a>	<a href="#">DTS AWL Appointment</a>

## Manually Adding a Client to a Waiting List

Access the Client's Referral


Specialty	Care Setting	Team	HCP Referred To	Date & time referral received	Contact	To Discharge	RTT	Waiting List(s)
GENERAL MEDICINE	Community and Clinic	Birmingham Healthcare		15 Jul 2013, 09:00	Y		<a href="#">Transfer</a>	

# Waiting Lists

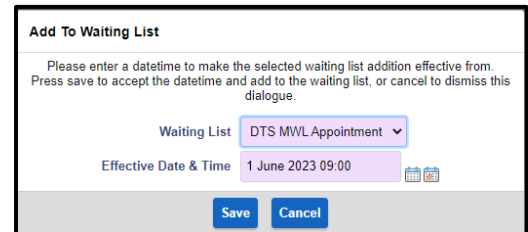


- Click 

Add to Waiting List window displays

- Click **Waiting List** drop down to choose relevant waiting list
- Click  to choose Effective from date & Time or type date into field
- Click **Save**

The Client is now added to the Waiting List.

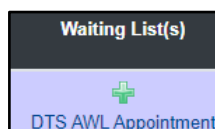


The dialog box titled 'Add To Waiting List' contains instructions: 'Please enter a datetime to make the selected waiting list addition effective from. Press save to accept the datetime and add to the waiting list, or cancel to dismiss this dialogue.' It features a 'Waiting List' dropdown menu set to 'DTS MWL Appointment' and an 'Effective Date & Time' field set to '1 June 2023 09:00' with a calendar icon. At the bottom are 'Save' and 'Cancel' buttons.

## Accessing a Waiting List (Automatic or Manual)

Locate the Referral

- Click the link for the named Waiting List



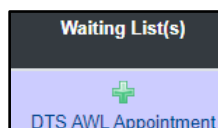
The Current Waiting Lists screen displays – notice the Status is pending. Following a decision by the Team, the Client should be accepted onto the Waiting List if appropriate.

RTT Pathways (0) @ Waiting Lists (1)										
Current Waiting Lists										
Waiting List▲	Start Date	Target Date	Days Waiting	Status	Priority	HCP	Comment	Details	Actions	Book
DTS Automatic WL Appointment	1 Jun 2023	-	1	Pending	Low					
Current referrals not yet added to a manual waiting list										
Specialty ▲	Care Setting	Team	HCP	Date & time referral received	Contact	To Discharge	Add			
None										

## Accepting a Client on a Waiting List

Once the decision has been made the Status needs to be updated

- Click the link for the named waiting list



- Click the Actions icon



The Action button will display a range of options (these options will vary depending on the status of the Waiting List entry and also whether your service has set up automatic acceptance).

**Accept:** Accepts the Client onto the Waiting List

**Reject:** Rejects the Client from the Waiting List, but keeps the referral open

**Transfer:** Allows the user to transfer the Client to another Waiting List



- Click **Accept**

Accept prompt displays

- Enter **Date & Time**

- Click **Accept**

The Status is now **Active**

## Booking An Appointment from the Waiting List

Both **Diary** and **Clinic Appointments** can be booked from a Waiting List

Total clients (All waiting/Total waiting) 466 / 466												
Name	Start Date	Target Date	Days Waiting	Available at Short Notice	Status	Priority	HCP	Comment	Details	Actions	Book	
FREEMAN, Isobel (Miss)	15 Jul 2013	-	3671		Removed (Pending)	Low						
BOWLES, Wendy (Mrs)	15 Jul 2013	-	3671		Removed (Pending)	Low						
HOUSTON, Pauline (Ms)	15 Jul 2013	-	3671		Removed (Pending)	Low						
EDWARDS, Courtney (Miss)	1 Aug 2013	-	3654		Pending	Low	BHATTI, Charan					
PEDSINSKI, Ania (Miss)	15 Jul 2013	-	3671		Pending	Low	BEARWOOD, William					
SINGH, Balan (Mr)	15 Jul 2013	-	3671		Pending	Low						

### For a **Diary Appointment**

- Click
- Choose **Community Appointment** to access HCP Diary

This will take you to your HCP Diary where the appointment can be booked

Once appointment has been booked you can return to the Waiting Lists screen

- Click the **Back to Waiting List** link(top left pane)

The booking icon will change to . This icon can be used if the appointment needs to be cancelled.

### For a **Clinic Appointment**

- Click
- Choose **Clinic Appointment** to access a Clinic
- Click **OK**

The Clinic Appointment screen displays for you to book the appointment


Once appointment has been booked you can return to the Waiting Lists screen

- Click the **Rio Back Arrow** to return to the Waiting list Screen

The booking icon will change to . This icon can be used if the appointment needs to be cancelled.



## Changing the Priority on a Waiting List

- Click **Actions** 
- Click **Update**


Update Waiting List screen displays

- **Start date** Autofills, change if required
- **Priority** Autofills, change if required
- **Reason for Waiting** Select as required
- **Comment** Complete as required
- Click **Save**

## Removing from the Waiting List

When either Community or Clinic Appointments are outcomed, Rio will display a prompt 'Performing this outcome will remove the client from the waiting list. Are you sure you wish to continue with this outcome?'

- Click **Yes**
- Click **Client's name**
- Click **CR – Referrals**
- Click **Referrals**

The Referral Waiting List icon has now changed to a  as the Client is no longer on the Waiting List

## Transferring a Client to a Different Waiting List

There may be occasions when the Client needs to be transferred to a different Waiting List e.g. the Client is currently on the Assessment Waiting List. Following triage it has been decided they need to be transferred to the Treatment Waiting List. We will transfer the Client to a different Waiting List.

Clients Waiting Lists can also be viewed from the Clinical Portal – Client's View screen

Access the Client's **Clinical Portal - Client's View** screen

Locate Navigation pane

- Click **CR – Referrals**
- Click **Current Waiting List**




- Click **Actions** 
- Click **Transfer**

Waiting List Transfer screen displays





- Click **Transfer Date** Enter the date
- Click **Transfer Reason** Select as required
- Click **Transfer to Waiting List** Select Waiting List as required
- **Comment** Add as required
- Click **Save**

The Client will now display on the selected Waiting List

## Accessing your Team's Waiting Lists

- Click **Menu**
- Click **Quick Menu**
- Click **Waiting Lists/RTT Pathways**
- Click  on Waiting Lists
- Specialty **Choose your specialty**
- Team **Choose your Team**
- Click **Go**

All of your Team's Waiting Lists will display

Waiting Lists/RTT Pathways							
<div> <div>⋮ MENU</div> <div>← ⓘ 🖨</div> </div>		<div> <div>Specialty</div> <div>GENERAL MEDICINE</div> <div>▼</div> </div>		<div> <div>Specialty</div> <div>Select</div> <div>▼</div> </div>		<div> <div>Deidre Aston   TRAIN03   Log out</div> <div>🏠</div> </div>	
<div> <div>⊙ Waiting Lists</div> <div>○ RTT Pathways</div> </div>		<div> <div>Team</div> <div>Birmingham Healthcare</div> <div>▼</div> </div>		<div> <div>HCP</div> <div>Select</div> <div>▼</div> </div>		<div> <div>Go</div> <div>Go</div> </div>	
Name ▲	Target Time (days)	Number Waiting	Approaching Target Time	Exceeded Target Time	Maximum Wait (days)	View	
BCHC Assessment Waiting List	0	466	-	-	3671	 	
BCHC Treatment Waiting List	30	11	0	11	3822	 	

# Waiting Lists



## Viewing Clients on a Waiting List from the Team's Waiting List

From the above screen

- Click

The Waiting List expands for you to see all the Clients on that Waiting List

Total clients (All waiting/Total waiting) 466 / 466											
Name	Start Date	Target Date	Days Waiting	Available at Short Notice	Status ▲	Priority	HCP	Comment	Details	Actions	Book
<a href="#">FREEMAN, Isobel (Miss)</a>	15 Jul 2013	-	3671		Removed (Pending)	Low					
<a href="#">BOWLES, Wendy (Mrs)</a>	15 Jul 2013	-	3671		Removed (Pending)	Low					
<a href="#">HOUSTON, Pauline (Ms)</a>	15 Jul 2013	-	3671		Removed (Pending)	Low					
<a href="#">EDWARDS, Courtney (Miss)</a>	1 Aug 2013	-	3654		Pending	Low	<a href="#">BHATTI, Charan</a>				
<a href="#">PEDSINSKI, Ania (Miss)</a>	15 Jul 2013	-	3671		Pending	Low	<a href="#">BEARWOOD, William</a>				
<a href="#">SINGH, Balan (Mr)</a>	15 Jul 2013	-	3671		Pending	Low					

## Filtering a Waiting List

You can filter Waiting Lists from the Waiting Lists screen.

- Click **Filter** (top of screen)
- Select option from drop down list

Depending on filter chosen, you may have to add dates.

- Click **Go**

Select

- Due back from suspension
- Placed on waiting list between
- Removed from waiting list between
- Hide suspended
- Show suspended
- Hide entries with booked appointments
- Show entries with booked appointments
- State of the waiting list on
- Entries for this HCP
- Open Event

Specialty	DIGITAL SKILLS TRAINING	Team	DST Total Mobile Training	Go
Filter	Placed on waiting list between	From Date	3 May 2023	To Date
			2 June 2023	Go



## Understanding Red, Amber, Green (RAG) codes

You may find the waiting list entries display in different colours.

Each waiting list can be set up with a target time and warning period by which an appointment should have been recorded. As a Client on the waiting list approaches the target time, the status of the Client is automatically updated and highlighted in a different colour on the screen.

Name	Start Date	Target Date	Days Waiting	Available at Short Notice	Status ▲	Priority	HCP	Comment	Details	Actions	Book
GASSER, Gisela (Ms)	14 Feb 2013	16 Mar 2013	4088		Exceeded	Low					
SIMPSON, Jane (Ms)	2 Apr 2016	2 May 2016	2945		Exceeded	Low					
SIMPSON, Nicola (Ms)	2 Apr 2016	2 May 2016	2945		Exceeded	Low					
SIMPSON, Pamela (Ms)	2 Apr 2016	2 May 2016	2945		Exceeded	Low					
WALKER, Ethan (Mr)	1 Apr 2024	1 May 2024	24		Warning	Low					
ORIBA, Angela (Mrs)	20 Apr 2024	20 May 2024	5		Active	Low					

**RED** - Client is overdue to be seen

**AMBER** - Client is approaching target for being overdue to be seen

**GREEN** - Service is still in target time to see Client

## Adding Waiting List Events

There may be a need for you to record details of an event related to a Client on the waiting list e.g. the Client is on holiday. You need to be on either the Waiting Lists screen for your specialty/team, or the Current Waiting Lists screen for your Client.

- Access your Teams Waiting Lists screen and click view for the Waiting List you wish to view (as explained in the relevant sections above).

- Click the Actions icon for your Client



- Click Events

The **Waiting List Events** screen is displayed

Waiting List Events

Waiting List

BCHC Assessment Waiting List

RTT Pathway

Unique Pathway ID

Event

Please Select

Start Date

End Date

Outcome

Please Select

Available at Short Notice

☐

Comment

# Waiting Lists







- **Event** Select as required
- **Start Date** Complete as required
- **Comment** Complete if required
- Click **Save**
- The **Waiting Lists** screen is displayed.

Waiting list entries with a status of **Active** can have events recorded against them. Events can be recorded by choosing a suspend or non-suspending option.

- Suspended Events – will pause the waiting time
- Non suspended or Open Events – will not alter the waiting time

If an Event is added to the **Active** waiting list entry, it will be updated to display either **Open Event** or **Suspended** depending on the event type selected.

WALKER, Murray (Mr)	15 Jul 2013	-	3950	Open Event 	Low			
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Note the icon:







- there is an Event on the WL

## To record an End Date for an Event

To record the end date of an open event

- Click the **Action** icon for your Client
- Click **History**




The Waiting List History screen displays

Waiting List History - BCHC Assessment Waiting List									
WALKER, Murray (Mr) 11 Apr 1942 (82 year(s) old) Male NHS, 941 022 5094									
Action Date	Started By	Start Date	Target Date	Status	Action	Priority	HCP	View/Edit	Event Details
2 Apr 2024	Aston, Deidre	15 Jul 2013		Open Event	Event	Low			
15 Jul 2013	Aston, Deidre	15 Jul 2013		Active	Accept	Low			
15 Jul 2013	Aston, Deidre	15 Jul 2013		Pending	Add	Low			



To view further details of the event that you want to update, click the arrow button

Further details about the event are displayed.

Action Date	Started By	Start Date	Target Date	Status	Action	Priority	HCP	View/Edit	Event Details
1 May 2024	Aston, Deidre	15 Jul 2013		Suspended	Event	Low			
<div> <div>Event</div> <div>Client on holiday</div> </div> <div> <div>Event Type</div> <div>Suspend</div> </div> <div> <div>Start Date</div> <div>1 May 2024 09:00</div> </div> <div> <div>Finish Date</div> <div>-</div> </div> <div> <div>Outcome</div> <div>-</div> </div> <div> <div>Comment</div> <div>more...</div> </div> <div> <div>Edited By</div> <div>Aston, Deidre</div> </div>									
15 Jul 2013	Aston, Deidre	15 Jul 2013		Active	Accept	Low			

- Click the green View/Edit button  for the event that you want to update.



# Waiting Lists



The **Waiting List Events** screen is displayed. The details entered previously are shown as read-only information.

Waiting List Events

Waiting List

BCHC Assessment Waiting List

RTT Pathway

Unique Pathway ID

Event

Client on holiday

Start Date

01 May 2024 09:00

End Date

Outcome

Please Select

Available at Short Notice

☐

Comment

Client on Holiday

- Enter an **End Date** and time
- Enter an **Outcome** if available
- Click **Save**
- The **Waiting List History** screen is displayed. A new entry is added to the **History** which shows the **Event End** action

Waiting List History - BCHC Assessment Waiting List									
Action Date	Started By	Start Date	Target Date	Status	Action	Priority	HCP	View/Edit	Event Details
5 Apr 2024	Aston, Deidre	15 Jul 2013		Active	Event End	Low			
2 Apr 2024	Aston, Deidre	15 Jul 2013		Open Event	Event	Low			
15 Jul 2013	Aston, Deidre	15 Jul 2013		Active	Accept	Low			
15 Jul 2013	Aston, Deidre	15 Jul 2013		Pending	Add	Low			

- Click **Waiting List** link (bottom of screen) to return to the **Waiting Lists** screen

WALKER, Murray (Mr)	15 Jul 2013	-	3950	Active	Low		
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Note the icon:



- An event has been end dated