Waiting Lists

Contents

Waiting Lists are used by Services to manage their patient appointments. The patient 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 patient, they will automatically appear on the waiting list. The Waiting List is also configured to either automatically or manually accept the patient.

Once the referral is added you can see the Automatic Waiting List that the patient 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		Transfer		DTS AWL Appointment

Manually Adding a Patient to a Waiting List

Access the Patient'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		Transfer		
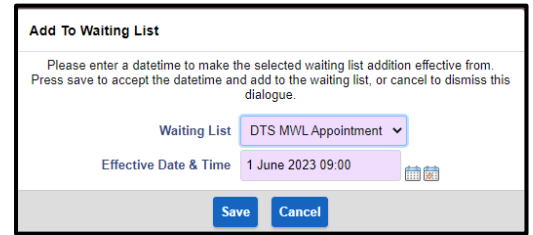
- Click

Add to Waiting List window displays

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- 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 Patient is now added to the Waiting List.

Add To Waiting List

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.

Waiting List: DTS MWL Appointment
Effective Date & Time: 1 June 2023 09:00

Save   Cancel

Accessing a Waiting List (Automatic or Manual)

Locate the Referral

Waiting List(s)

➕ DTS AWL Appointment

- Click the link for the named Waiting List
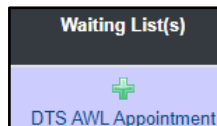
The Current Waiting Lists screen displays – notice the Status is pending. Following a decision by the Team, the Patient should be accepted onto the Waiting List if appropriate.

○ 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 patient on a Waiting List

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

- Click the link for the named waiting list

Waiting List(s)

➕ DTS AWL Appointment
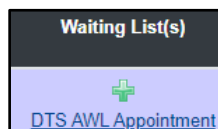
Actions
📝

- 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 patient onto the Waiting List

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

Transfer: Allows the user to transfer the patient to another Waiting List

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- 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

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 **Back to Waiting List** (top left pane)

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 **Return to Client Centric Waiting List** (top left pane)

The booking icon will change to . This can also 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

- Ensure **Start date is checked**
- Change **Priority as required**
- Add **Reason for Waiting**
- Add **Comment** as required
- Click **Save**

Waiting List	DTS Automatic WL Appointment
RTT Pathway	
Unique Pathway ID	
Start Date	1 June 2023
Time Waiting (days)	1
Status	Active
HCP	
Target Date	
Priority	Medium
Reason for Waiting	Specialist treatment
Comment	needs to be seen quickly

Removing from the Waiting List

When either Community or Clinic Appointments are outcomed Rio will display a prompt

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

Automatic Waiting List

Performing this outcome will remove the client from the 'DTS Automatic WL Appointment ' waiting list.
Are you sure you want to continue with this outcome?

[Yes] [Cancel]

The Referral Waiting List icon has now changed ➕

Transferring a Patient to a Different Waiting List

There may be occasions when the Patient needs to be transferred to a different Waiting List for e.g. the Patient is currently on the Assessment waiting list but following triage it has been decided they need to be transferred to the Treatment waiting list. We will transfer the patient to a different waiting list.

Patients waiting lists can also be viewed from the Clinical Portal – Client's View

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

Locate Navigation pane

- Click **CR – Referrals**
- Click **Current Waiting List**
- Click **Actions** 📝
- Click **Transfer**

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Waiting List Transfer screen displays

- Click **Transfer Date**   **Add Date**

- Click **Transfer Reason**   **Select as required**

- Click **Transfer to Waiting List**   **Select Waiting List as required**

- **Comment**   **Add as required**

- Click   **Save**

The Patient 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

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	⊕

Viewing patients 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 patients on that Waiting List

				Available at							
Name	Start Date	Target Date	Days Waiting	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			ⓘ	📝	⊙

Total clients (All waiting/Total waiting) 466 / 466

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

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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 patient on the waiting list approaches the target time, the status of the patient 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 - Patient is overdue to be seen

AMBER – Patient is approaching target for being overdue to be seen

GREEN - Service is still in target time to see Patient

Adding Waiting List Events

There may be a need for you to record details of an event related to a Patient on the waiting list for 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 Patient.

- 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 Patient 📝

- Click Events

  ```
  Events
  History
  Remove
  Transfer
  Update
  ```

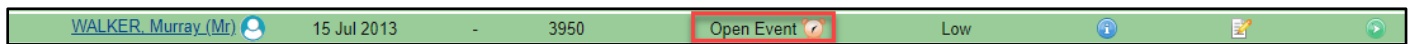The **Waiting List Events** screen is displayed

- Select an **Event** from the pick list

- Record a **Start Date**

- Add a **Comment** 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.

- o Suspended Events – will pause the waiting time for the client
- o 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.

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 Patient

- Click **History**

The Waiting List History screen is displays

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

Further details about the event are displayed.

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

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

- 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

- Click **Waiting List** link to return to the **Waiting Lists** screen

Note the icon:

 - An event has been end dated