Waitlist Management

User guide

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Contents

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1 Document

1.1 Purpose of this guide

This document provides a user guide for RIVIAM's Waitlist Management (WLM).

WLM will be accessed through the RIVIAM Web interface, and this user guide will explain how to use the functionality provided. Where functionality has not yet been released, we have marked it in blue as "Coming soon." This user guide will be updated as new functionality becomes available.

We have included a glossary of terms, so please take a moment to familiarise yourself with the terminology. This will help you gain a clearer understanding of the functionality provided.

This user guide includes:

a) How to search for and select patients with a patient record on RIVIAM and see the status of their appointments.

b) View About Me for a patient (*This feature is only visible to customers who have included this functionality).*

c) Viewing the different WLM dashboards to see a summary of referrals and their appointment statuses.

d) Filtering waitlists.

e) Taking actions, such as booking or cancelling an appointment and manual release of appointments for booking by patients using the Patient Portal.

f) Manage patients on the waitlists by removing or reinstating the referral.

g) Clinic management: searching for clinics, cancelling clinics, or removing individual clinic slots.

2 Glossary of terms

Term	Definition
Patient Portal	The Patient Portal is a RIVIAM Digital Care product that allows patients to manage their appointment bookings, communicate with their healthcare provider, and keep up to date with relevant healthcare news and information.
About Me	The PRSB About Me standard is a set of guidelines for how health and care professionals should document and share information about what's most important to a person receiving care. RIVIAM Web users can view this information in patient records if the About Me functionality has been enabled in the functionality.
RIVIAM Web	Users accessing RIVIAM's Waitlist Management will use our RIVIAM Web interface and secure HSCN connectivity.
TPP S1	TPP SystmOne clinical system. The clinical system used by the customer (Circle Integrated Care) to manage patient care.
Service area	The relevant service area, for example, Bedfordshire or Greenwich.
Rota type	The service or pathway information, e.g. APP Face to Face or Physiotherapy.
Slot type	The type of appointment. It can be initial or follow-ups.
Body part	The patient's body part associated with the referral.
Skill	The skill that is provided by the healthcare professional, e.g. injecting.
Urgency	Whether a referral is Urgent or Routine.
Referral status	Referral status can be: 1. Waiting 2. Ready to book 3. For management 4. Booked 5. Removed.

3 Background

3.1 What is Waitlist Management?

Waitlist Management is a service designed to help healthcare providers efficiently track, manage and act on patient waitlists, improving service delivery, clinic slot utilisation and patient satisfaction.

It offers a clear and organised view of patient waitlists by appointment status, service area, priority (Routine or Urgency), pathway (rota type) and appointment type (slot type, for example, initial or follow-up appointment).

Additionally, WLM enables users to book and cancel appointments on behalf of patients and release appointments, allowing patients to use the portal to book appointments themselves.

The functionality to manage clinics can also be included.

Waitlist Management is a key enabler for RIVIAM's Patient Portal.

3.2 Benefits

The benefits of RIVIAM's Waitlist Management are as follows:

- **Optimised waitlist and clinic management**: Effectively handles waitlists, including last-minute cancellations, improving service delivery and clinic slot utilisation.
- **Enhanced patient satisfaction**: This application allows staff to manage appointments for patients who cannot use the Patient Portal, improving the overall patient experience.
- **Improved decision-making**: With access to comprehensive patient and referral information, you can make informed decisions.

4 Waitlist Management log-in

4.1 Overview

To log into the Waitlist Management interface, you will require a secure HSCN or whitelisted IP address.

Your organisation will provide the login URL to access Waitlist Management on RIVIAM Web. This URL is not publicly shared, so please do not use a search engine to find the link.

4.2 New users

When you are set up as a new user, you will automatically receive an email containing an activation code to activate your account.

Upon receiving this, please load the RIVIAM Web log-in page and select **Activate a new code under the log in button.**

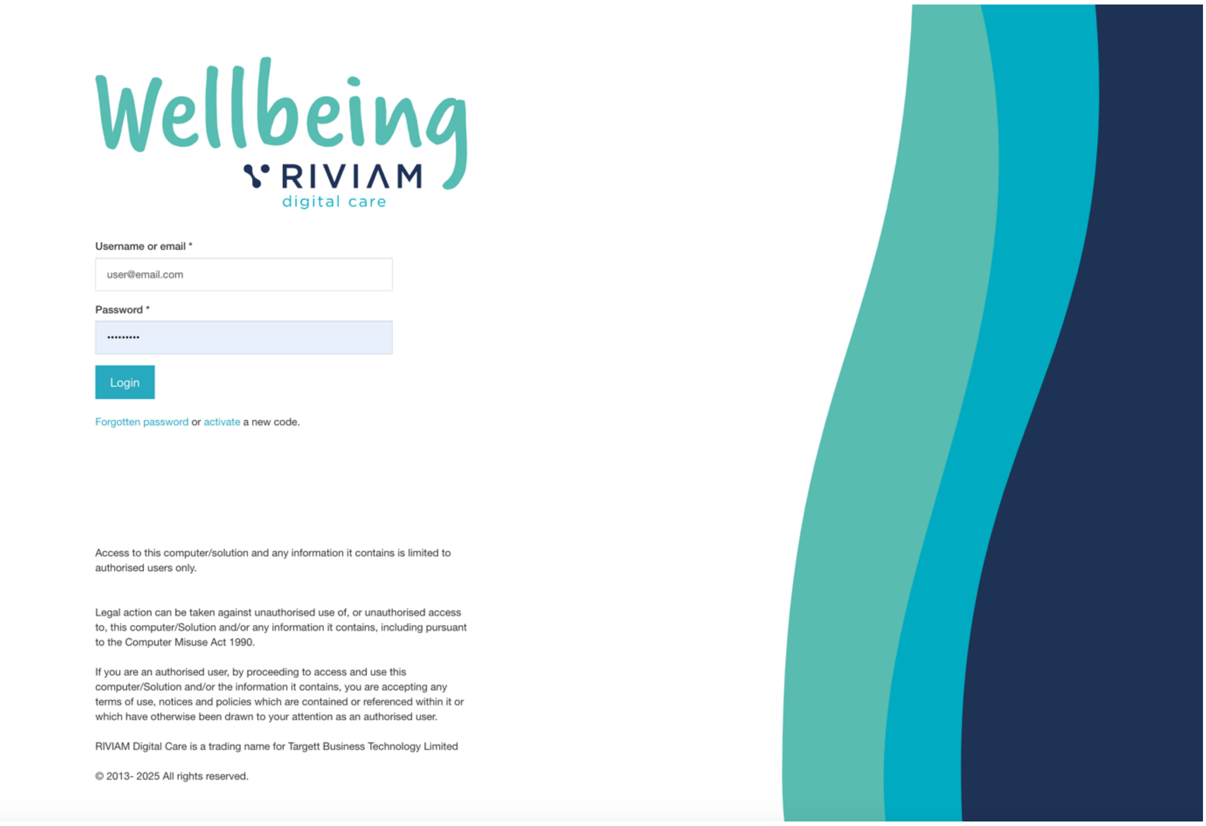

Figure 1: Login screen.

Please follow the on-screen instructions and set up a password. You should then be able to log in using your login credentials.

We have developed some helpful training resources to assist you.

- [How to activate your RIVIAM Account]
- [Forgotten Password]

	Please note that the activation code is valid for up to 12 hours. To request a new code, please select Forgotten password and follow the on-screen instructions.

5 Homepage

5.1 Overview

Once logged in, the Homepage will be displayed.

Here, you can view shortcuts to the following:

1. **Current work list** – shows the patient records that are locked by you and cannot be changed by other users.
2. **Recently accessed referrals** – shows the patient referrals that you have recently visited.
3. **RIVIAM News** – provides information about RIVIAM.
4. **RIVIAM Support** – link to the RIVIAM support desk (coming soon).

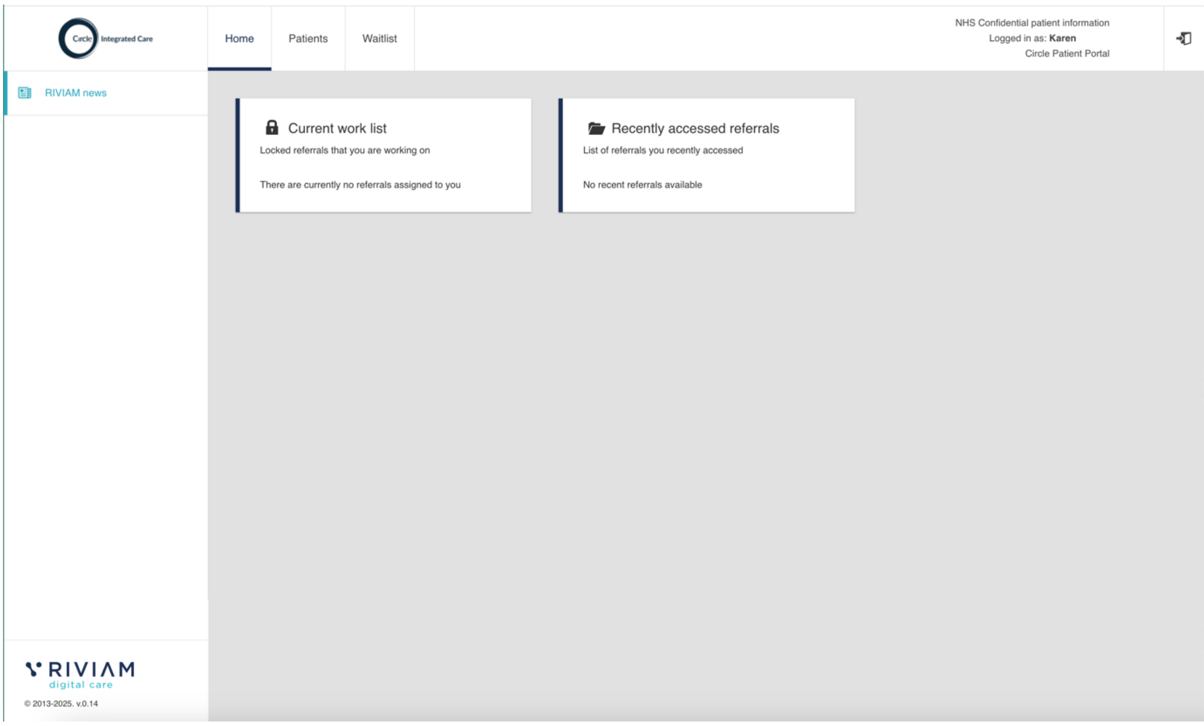

Figure 2: Homepage.

6 Patients page

6.1 Overview

The Patients page enables you to search for a patient and provides shortcuts to your recently accessed patients and most accessed patients.

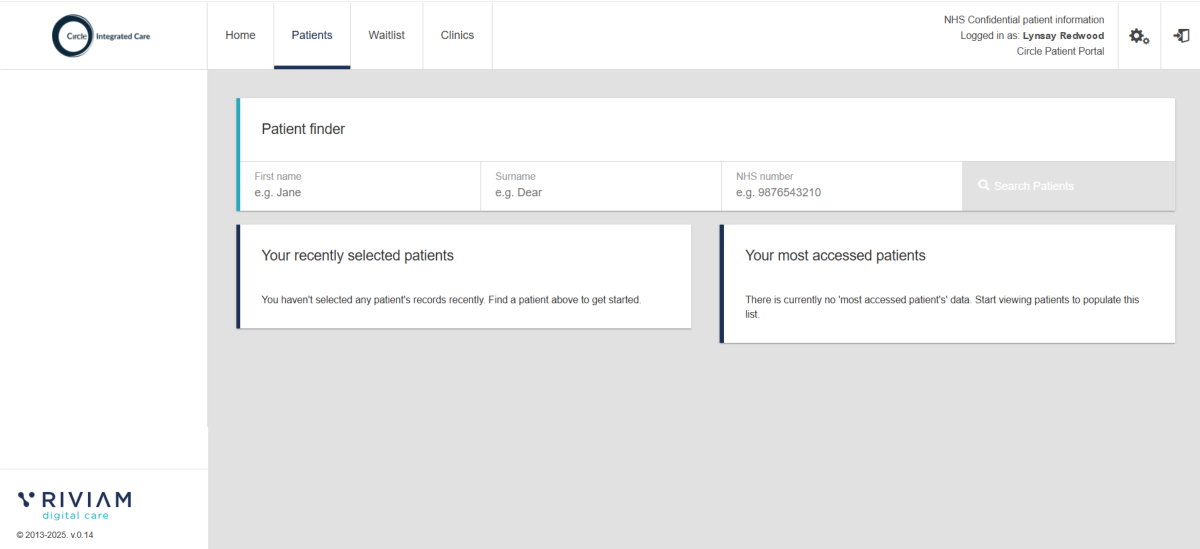

Figure 3: Patient tab initial view.

To access a patient listed in the recently selected patients or the most accessed patients, please select **View patient** to open the patient record**.**

6.2 Patient finder search

The Patient finder search allows you to search for a patient by first name and surname or NHS number. Enter the relevant details and select **Search Patients**.

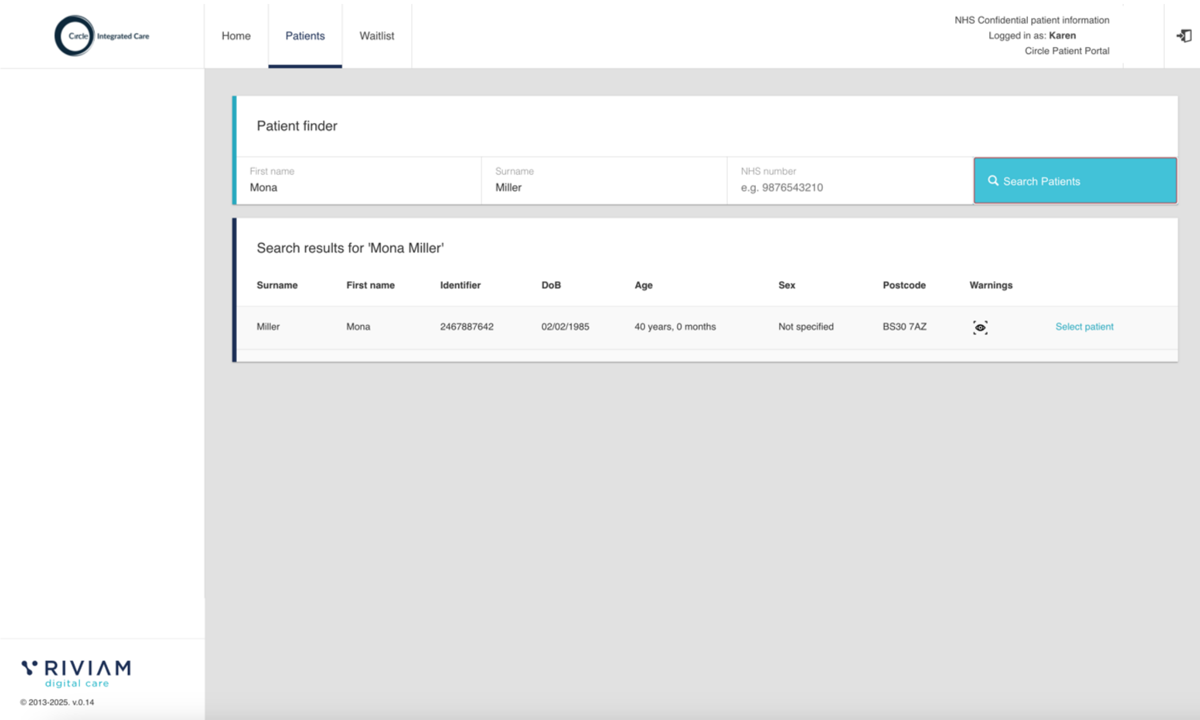

Figure 4: Patient search.

If a record is found, the search results will be listed. **Select patient** to view the waitlist referrals for that person.

6.3 Patient single-view

Once you have chosen a patient, see a list of their waitlists and appointment statuses.

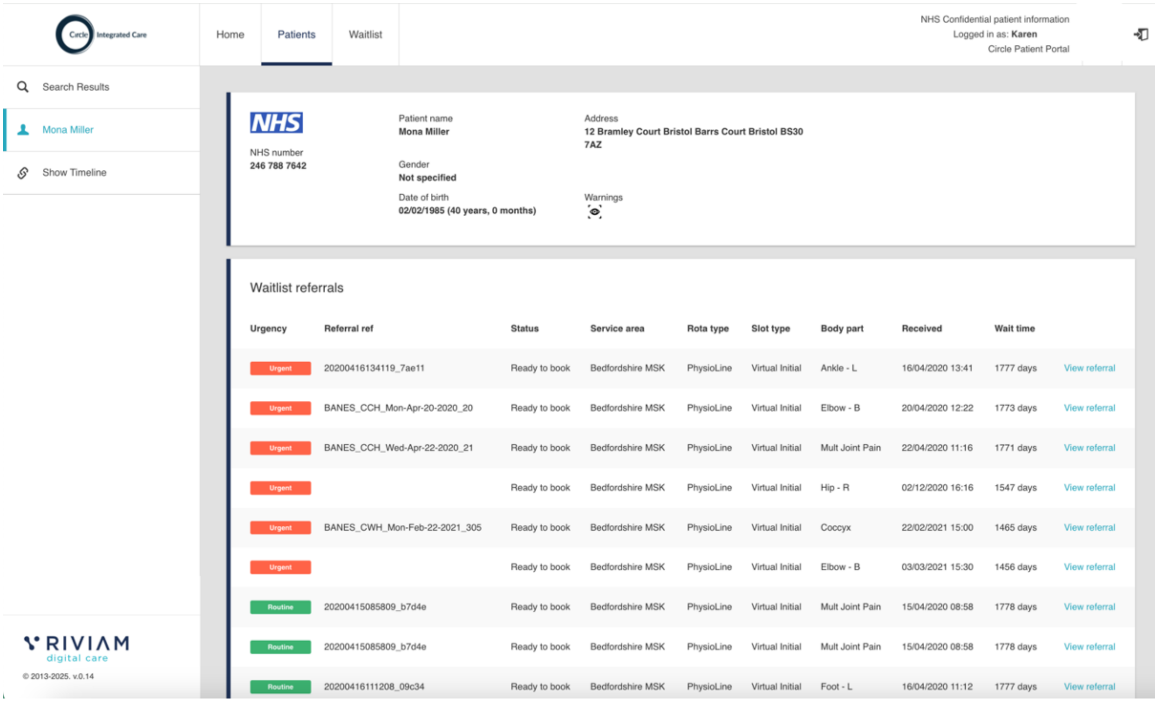

Figure 5: List of patient waitlist referrals.

Each waitlist listed will be labelled based on the:

- Urgency of the referral (Urgent or Routine).
- The referral reference number.
- The status of the appointment
  - Waiting (patients waiting to be invited to book an appointment)
  - Ready to book (patients who have received an invitation to book an appointment using the Patient Portal)
  - For management (patient referrals that require review and intervention)
  - Booked (patients who have booked an appointment)
  - Cancelled (patients where the healthcare provider or the patient has cancelled the invitation to book an appointment).
- Service area (the location of the service).
- Rota type (the type of treatment provided).
- Slot type (the type of appointment, initial or follow-up).
- Body part.
- Date and time received.
- Wait time.

To view the referral associated with the waitlist, select **View referral.**

6.4 Actions from the patient's view

From the patient's view, the following actions can be performed:

- Book an appointment.
- Cancel an appointment.
- Send an invitation to the patient to book an appointment.
- Remove a patient from the waitlist.
- Reinstate a referral to the waitlist.

The available actions depend on the referral's status. For instance, if the appointment is already booked, the actions available will be to cancel or remove the patient from the waitlist.

6.4.1 How to reinstate a referral if it's been removed

If you have removed a referral from the waitlist and need to reinstate it, this must be done in this patient's view.

- Go to the Patients page.
- Search for the patient by first name, last name, or NHS number.
- Select View patient.
- The patient referrals will be displayed.
- Right-click on the referral you wish to reinstate, and an actions box will appear.
- Select "Reinstate patient to waitlist."
- A pop-up window will appear.
- Select a reason for the change.
- Click ‘Confirm’.

When you open the referral, a timeline event will be created to document the change.

The status of the referral will change from ‘Removed’ to ‘Waiting’.

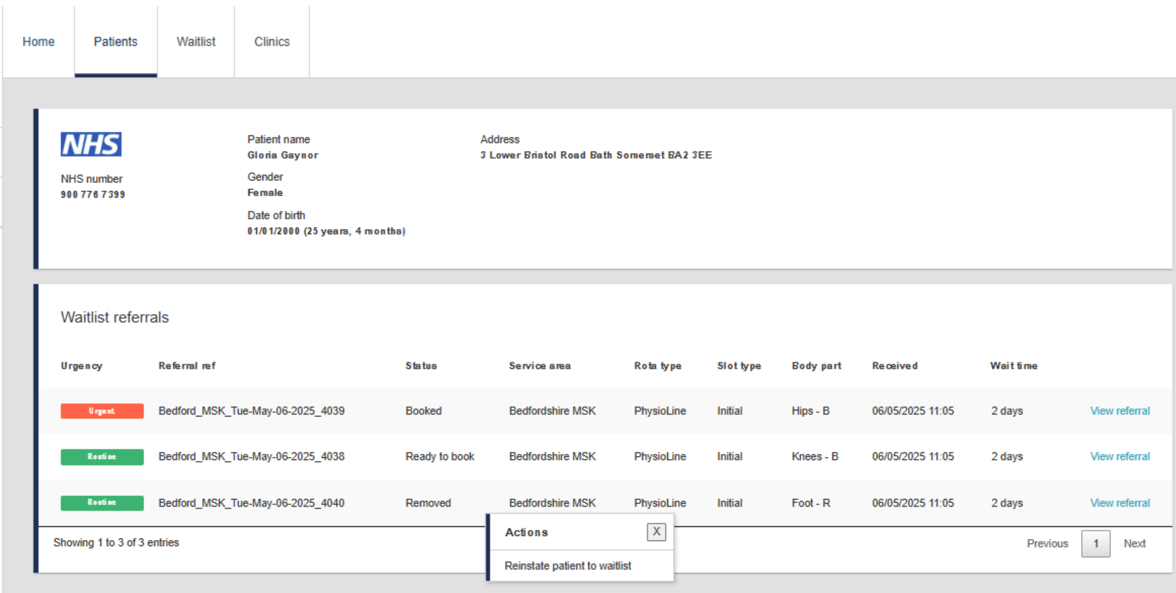

Figure 6: Reinstate a removed waitlist referral.

6.5 View referral

The Referral Navigator is presented with the referral associated with a patient's waitlist record, where you can access basic information, such as the patient’s demographics, related referrals, and any available documents.

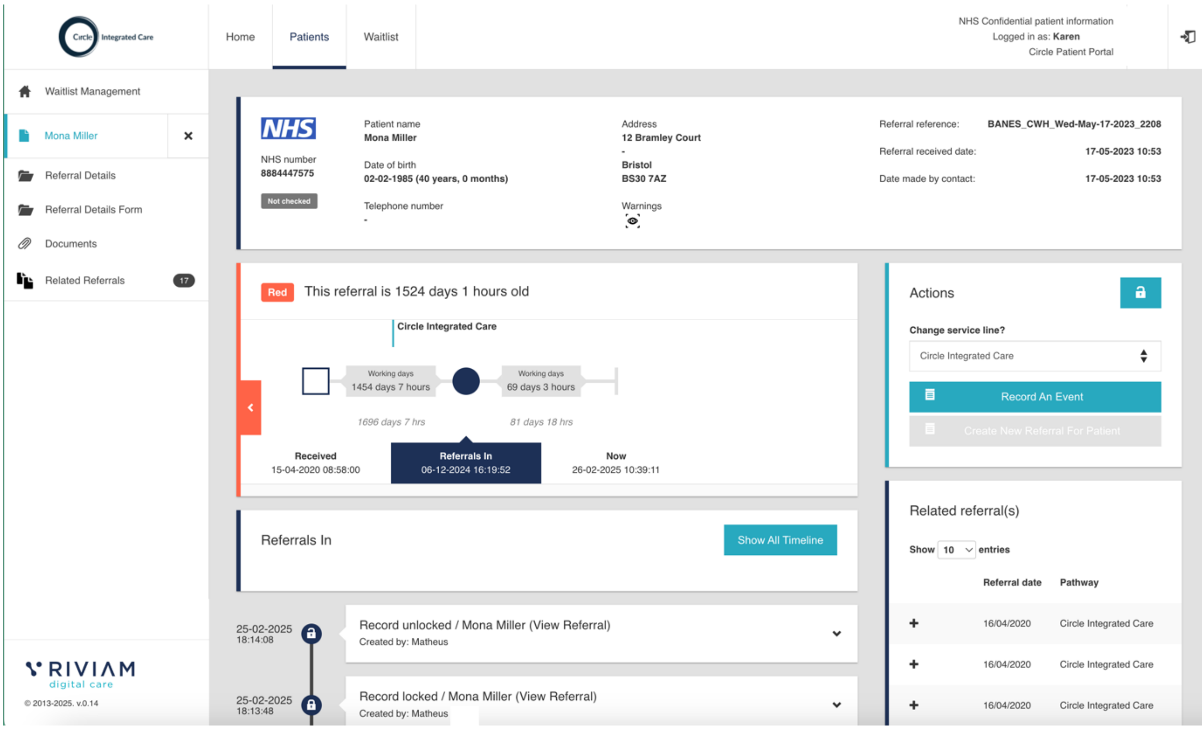

Figure 7: Referral page navigator.

6.6 ‘About me’ information

The patient completes their About Me information using RIVIAM’s Patient Portal, and the data is then visible under the patient’s details on RIVIAM Web.

	Please note that this feature is customer-configurable and will only be included in the software if your organisation have requested this functionality.

To access this information, select the **referral details** tab, and the information will be displayed.

The Professional Records Standards Body (PRSB) 'About Me' standard is a set of guidelines for how health and care providers should enable patients to share information about what is most important to them.

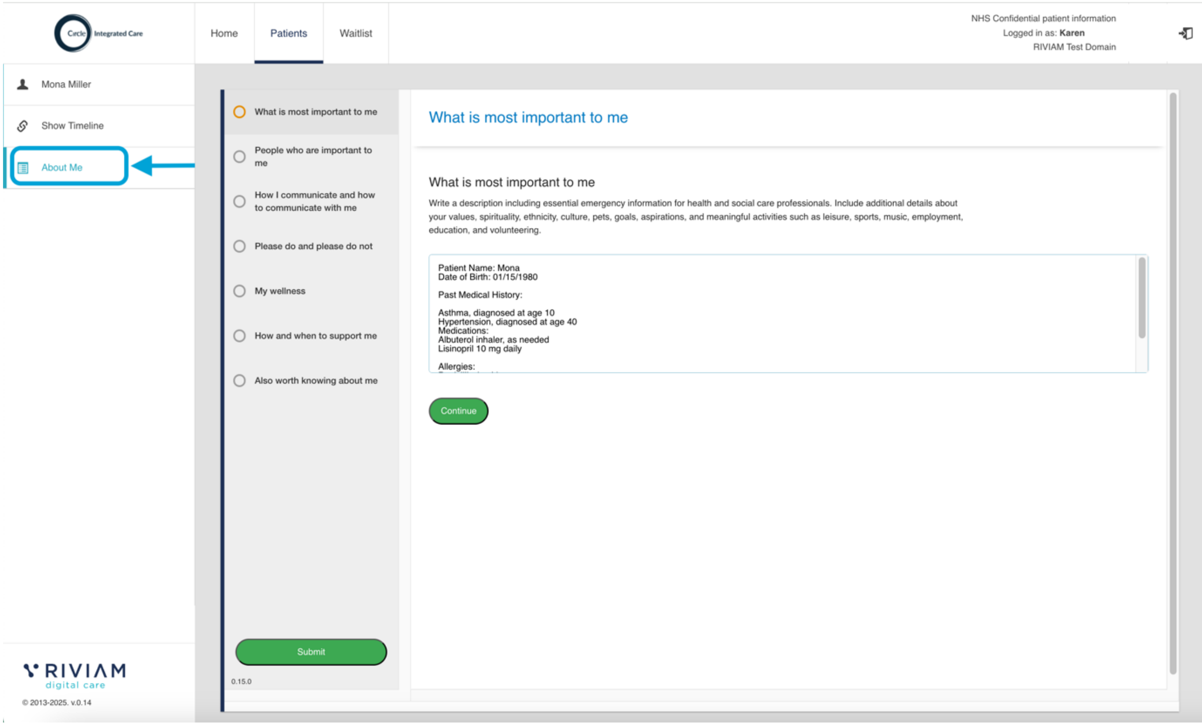

Figure 8: About me.

	Note: Future functionality will include integrating the About Me fields into the clinical system. This is currently not in scope.

7 Waitlist page

The Waitlist page provides a central hub for managing all appointments.

You can:

- view and organise referrals by status, urgency, service area or rota type
- search for specific referrals or use one of three dashboards to see an overview of all service areas, referral status, or referrals within a specific service area.

The left-hand navigation menu offers enhanced filtering to help you quickly find and manage the referrals you need.

7.1 Waitlist referral search

The referral search allows you to search for a patient by entering the first name and surname, NHS number, or referral reference number.

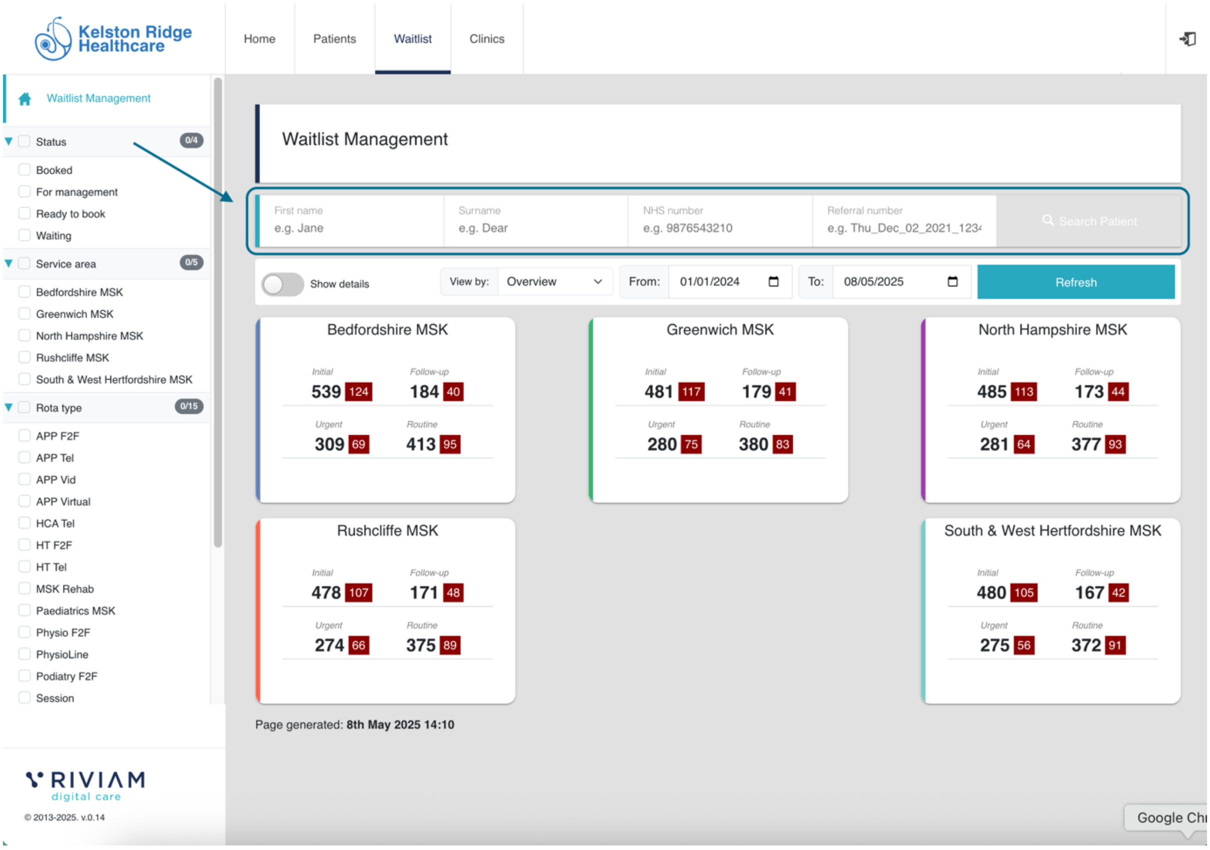

Figure 9: Waitlist referral search.

RIVIAM will complete a search based on the information provided and the search results will appear. To open a referral from the search results, select **View referral**.

7.2 Waitlist filters

On the left-hand navigation menu, you will see a list of enhanced filtering options which will allow you to choose which waitlist referrals you would like to filter by to refine your search. Filtering options are by:

- Referral status
  - Booked
  - For management
  - Ready to book

- Waiting
- Service area (the location of the service).
- Rota type (the type of treatment provided).
- Slot type (the type of appointment, initial or follow-up).
- Urgency
    - Routine
    - Urgent.

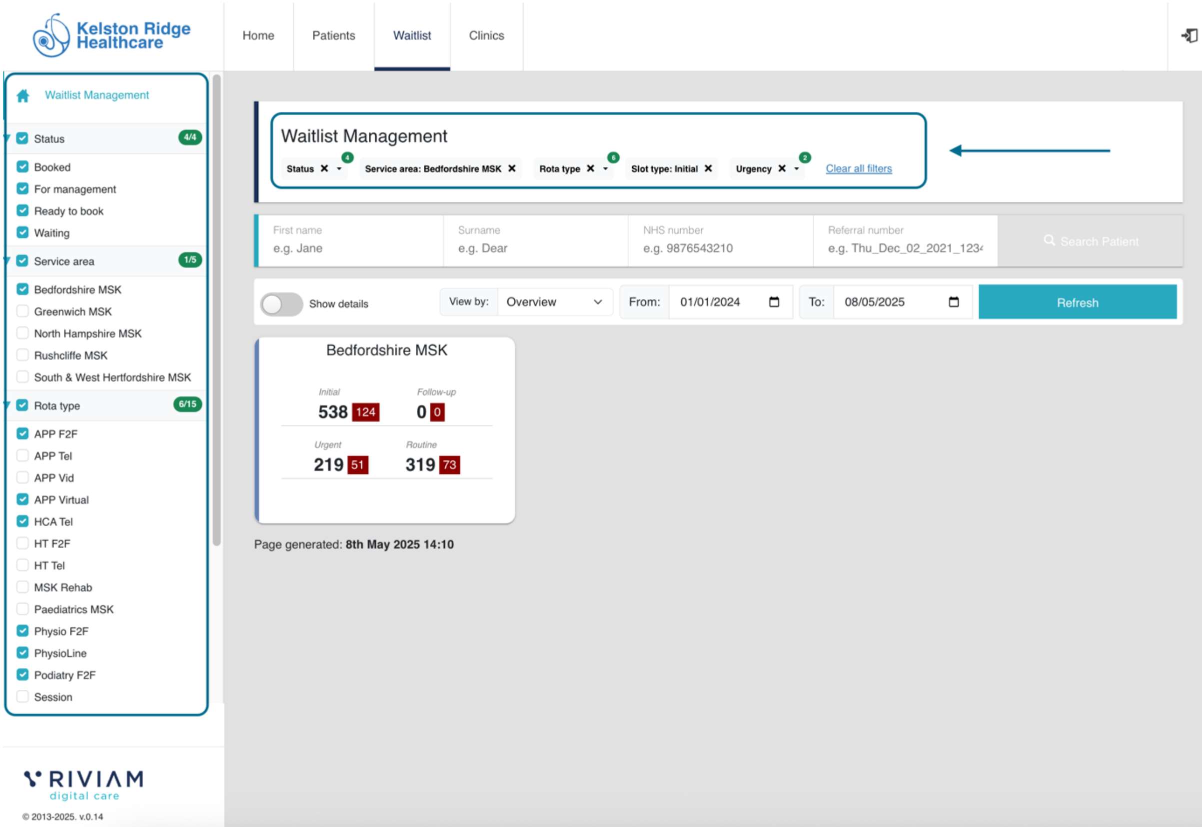

Figure 10: Using and viewing filters.

As you select each filter option, a list of patients who meet the selected filter criteria will appear. To view an individual referral, select **View referral.**

	Please note that filters are cumulative, and it will display which filters have been selected **on the top panel and the filter list.** Filters can be cleared individually by deselecting the filter, or to clear all filters, select **clear filters.**

8 Waitlist dashboards

The Waitlist page offers three dashboard views.

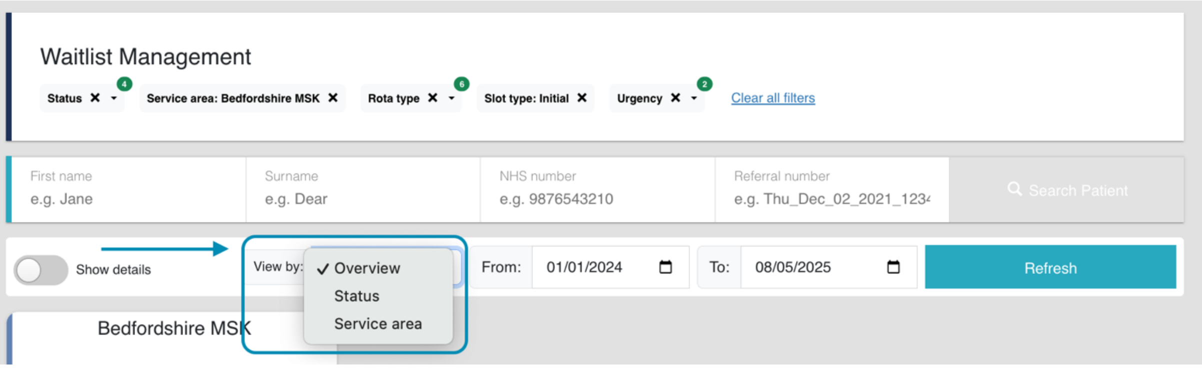

Figure 11: Dashboard options 'View by'.

- Waitlist overview
- Referral status
- Service area

Select from the options available in the “View by” field.

8.1 The Waitlist overview dashboard

The Waitlist overview dashboard is the default view when you open the Waitlist page and provides a high-level summary of each contract area. It displays the number of initial and follow-up referral appointments, categorised as urgent or routine.

A red box highlights the number of referral appointments with a "For Management" status, indicating patients who require team assistance with booking, as they are unable to use the Patient Portal.

This dashboard and enhanced filtering options on the left-hand side menu can help prioritise activities by service area/contract and service (rota type).

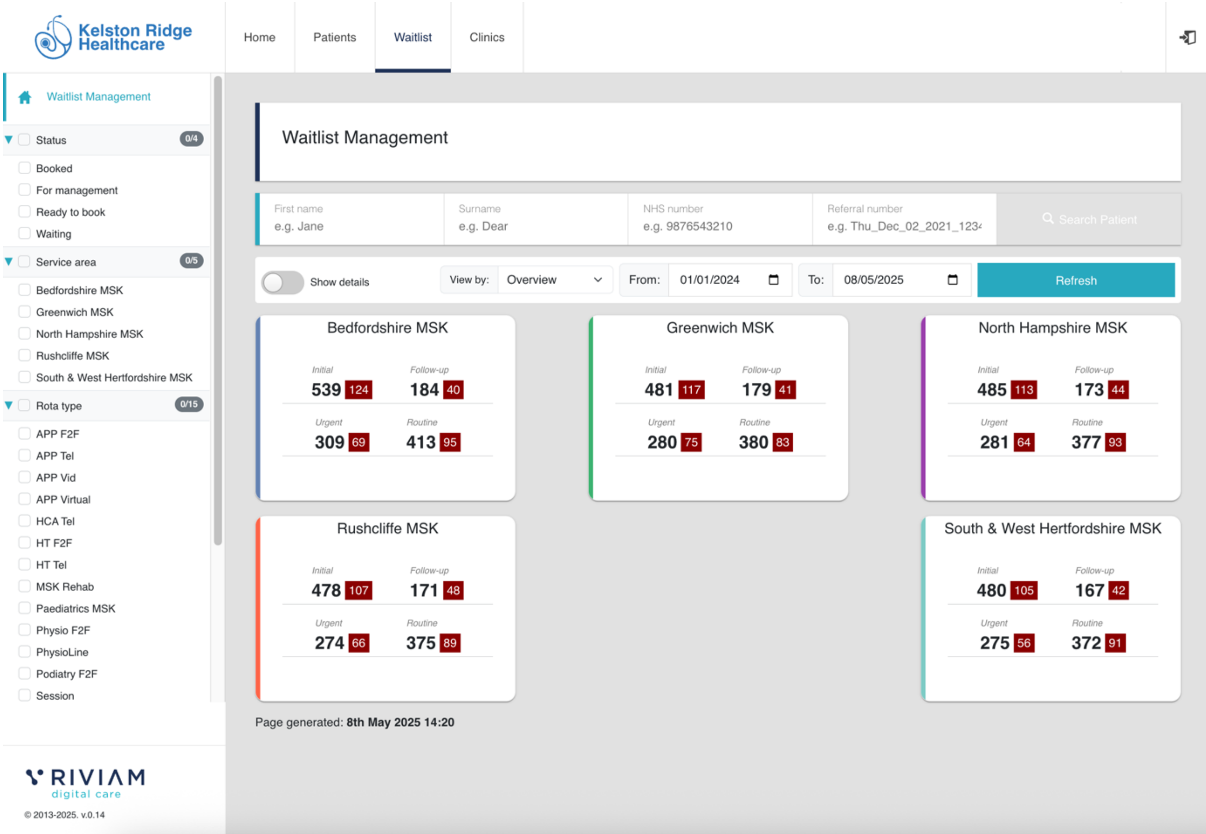

Figure 12: Overview dashboard.

For more detailed information, toggle the "Show details" option. This expands the view to include a breakdown by contract area and individual rota types, presented in columns:

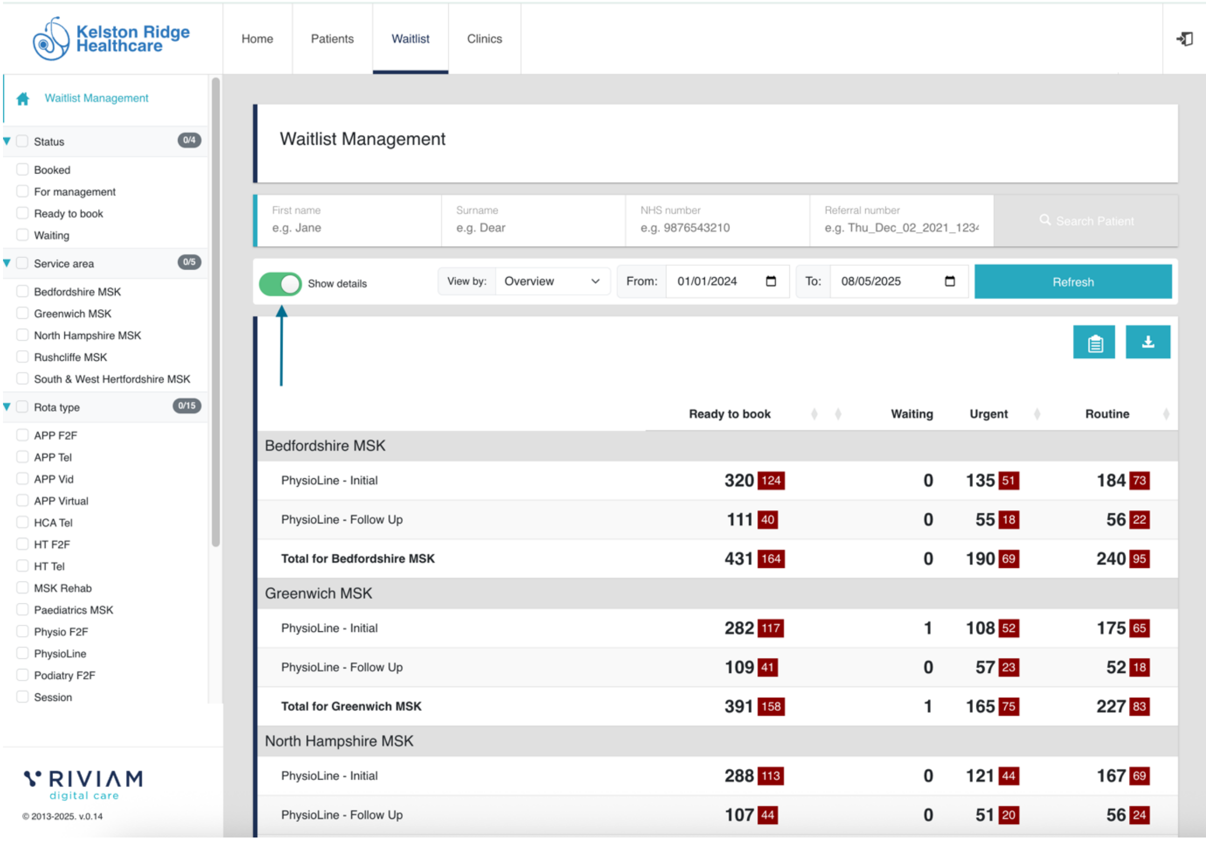

Figure 13: Overview dashboard show details.

- Contract area (the specific contract area).
- Service (rota type, the type of service provided).
- Appointments Ready to book (the total number of appointments ready to be booked, with a red box highlighting those with a "For management" status).
- Referrals (Waiting, Urgent, Routine) with a red box highlighting those with a "For management" status).

Clicking on any service (rota type) will display a list of associated referrals.

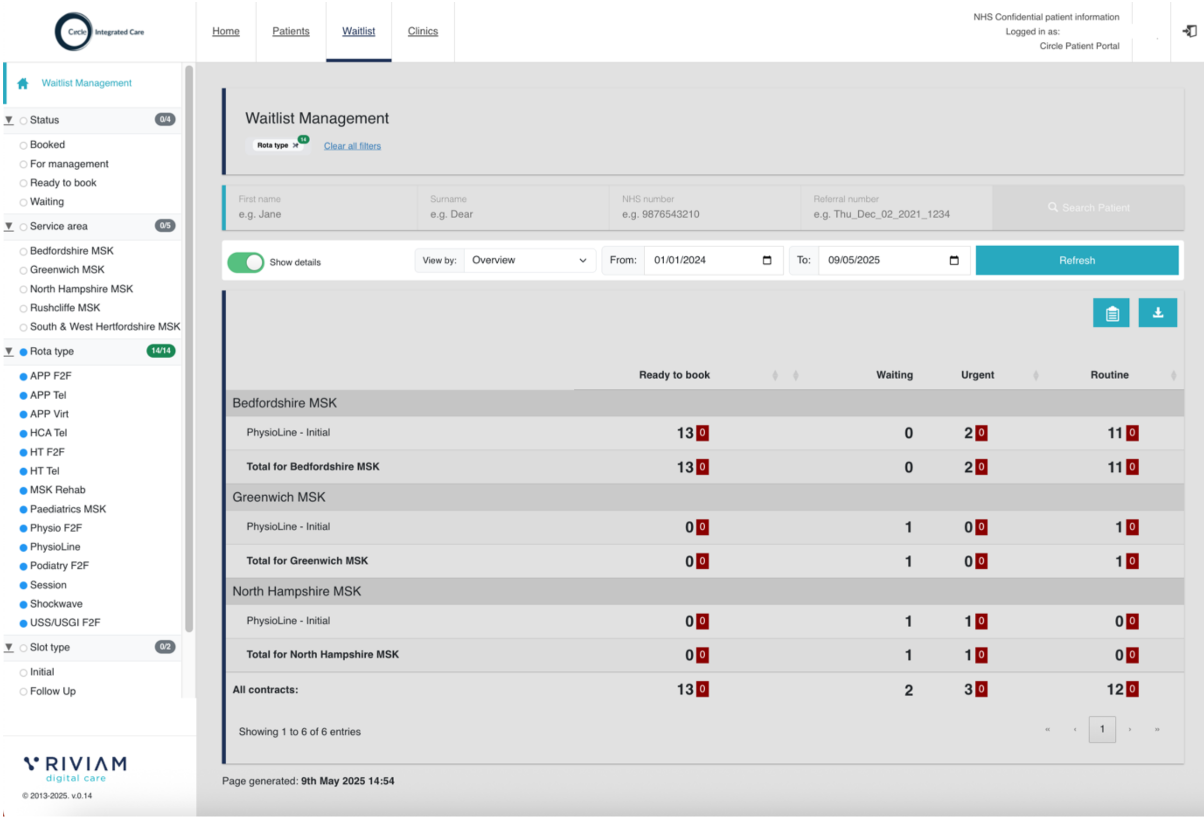

Figure 14: List of referrals by rota type.

To view an individual referral from the list displayed, select **View referral**.

8.2 Waitlist status dashboard

By selecting the ‘View by’ field, you can change to view the dashboard by **Status.**

The waitlist status dashboard will display information on the status of each referral.

How many patients are:

- Waiting
- Ready to book
- Booked
- For management.

It will also display how many referrals are categorised as Urgent or Routine for this status.

The enhanced filtering allows you to refine and narrow down the referrals displayed on the status dashboard. This helps you quickly find and manage the specific referrals you need to work with by providing the ability to filter by various criteria, such as:

Status: filter referrals based on their status (e.g., Booked, For management, Ready to book or Waiting)

Urgency: filter referrals based on their urgency level (e.g., Urgent, Routine)

Service area: filter referrals based on the service area they belong to

Rota type: filter referrals based on the specific rota type or service provided.

Slot type: follow up or initial.

Combining these filters allows you to create a specific list of referrals that meet your search criteria, making it easier to prioritise tasks and manage your workload.

A "Show dashboard" toggle lets you control the visibility of the statistics graph. Turning the toggle on displays the central graph and turning it off will keep it hidden.

The default view for the central graph presents the complete list of appointments, however, clicking on any ‘see all’ links in status cards on the right-hand side will update the central graph. Alternatively, you can also select the green Routine or red Urgent buttons to update the central graph.

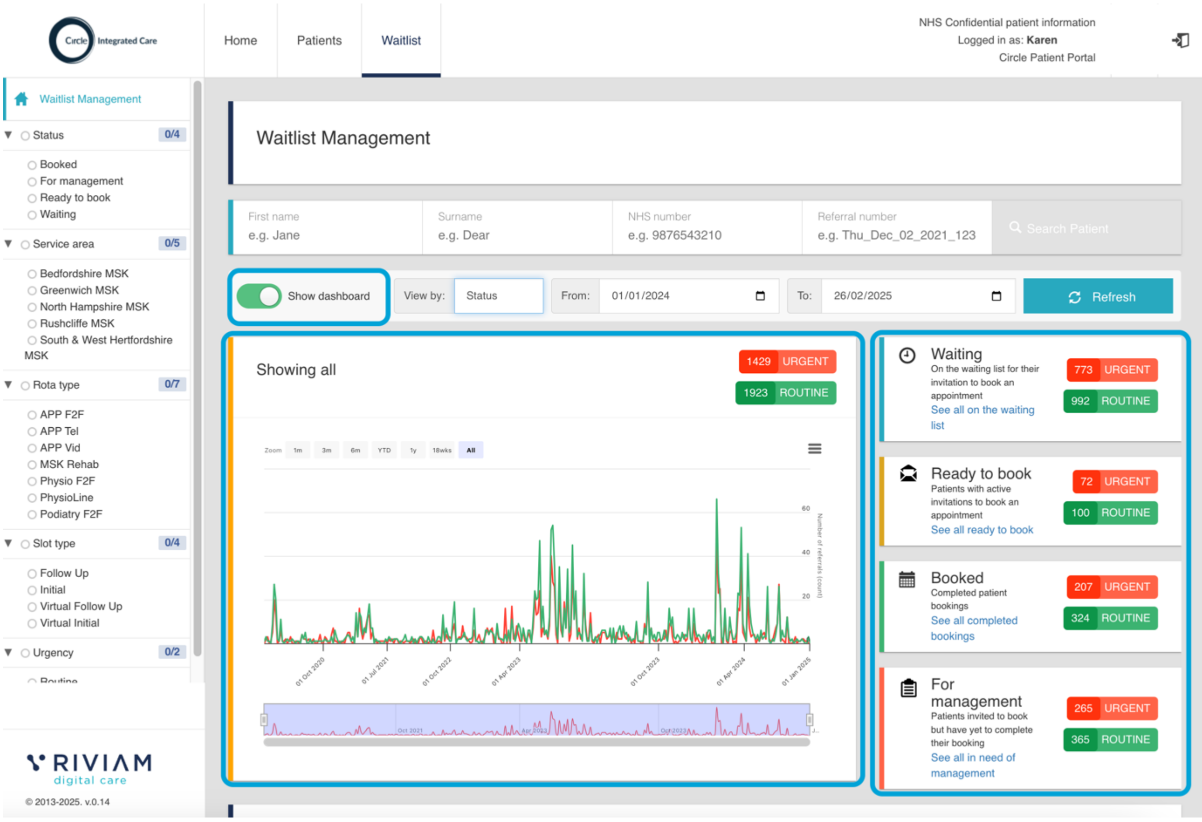

Figure 15: View Waitlist status dashboard.

To view a list of waitlists assigned to a particular status, you can click on the following:

- The “See all” links in the status card list all the records currently assigned to this status.
- By pressing the red/green button, view the list of records sorted by urgency.
- The bars in the central graph (coming soon).
- As enhanced filters are applied, a refined list of referrals that meet the criteria will be listed beneath the central graph.

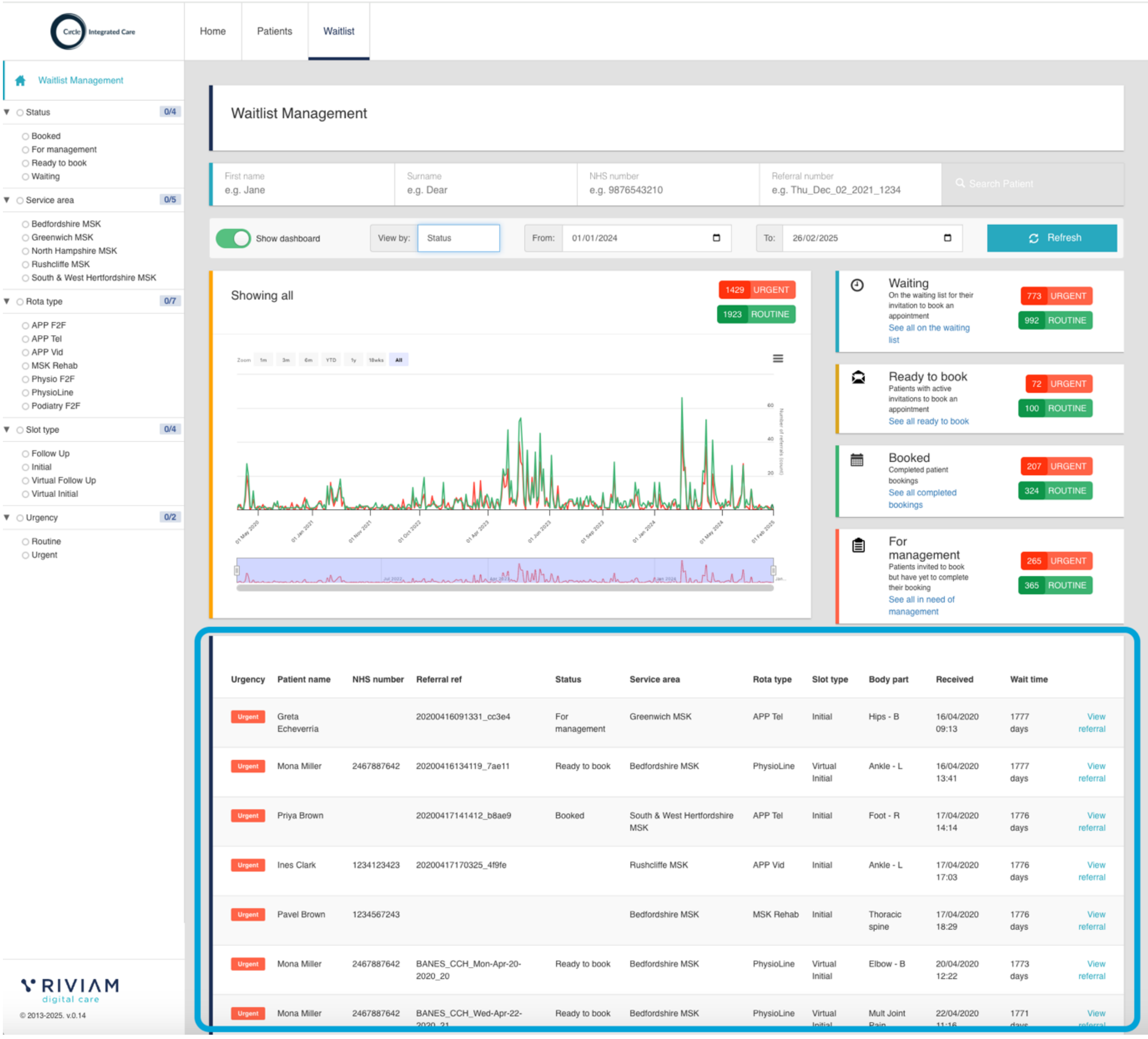

Figure 16: See a list of referrals from the Status dashboard.

The list includes the patient's name, NHS number, the time when the referral was received and the wait time.

	Please note – referrals in 'For management' require review and intervention. This can be for several reasons, including: 1. The appointment has been cancelled twice by the patient 2. The patient is restricted from self-booking for specific reasons 3. The patient is unable to book themselves via Patient Portal 4. The patient does not have a mobile number or email 5. The patient can book but hasn't, and two weeks has elapsed since invited.

8.3 Service area dashboard

By selecting the "View by" option, you can switch to view the dashboard by **Service area.**

The waitlist service area dashboard will display information on each referral's service area, such as North Hampshire, South, and West Hertfordshire.

It will also display how many referrals are categorised as Urgent or Routine. The enhanced filtering allows you to refine and narrow down the referrals displayed on the status dashboard. This helps you quickly find and manage the specific referrals you need to work with by providing the ability to filter by various criteria, such as:

- **Status: f**ilter referrals based on their status (e.g., Booked, For management, Ready to book or Waiting)
- **Urgency:** filter referrals based on their urgency level (e.g., Urgent, Routine).
- **Service area:** filter referrals based on the service area they belong to.
- **Rota type:** filter referrals based on the specific rota type or service provided.
- **Slot type:** follow up or initial.

By combining these filters, you can create highly specific views of your referrals, making it easier to prioritise tasks and manage your workload effectively.

A "Show dashboard" toggle lets you control the visibility of the weekly statistics graph. Turning the toggle on displays the central graph but turning it off hides it.

The default view for the central graph presents the complete list of appointments, however, clicking on any 'see all' links in status cards on the right-hand side will update the central graph. Alternatively, you can also select the green routine or red urgent flags to update the central graph.

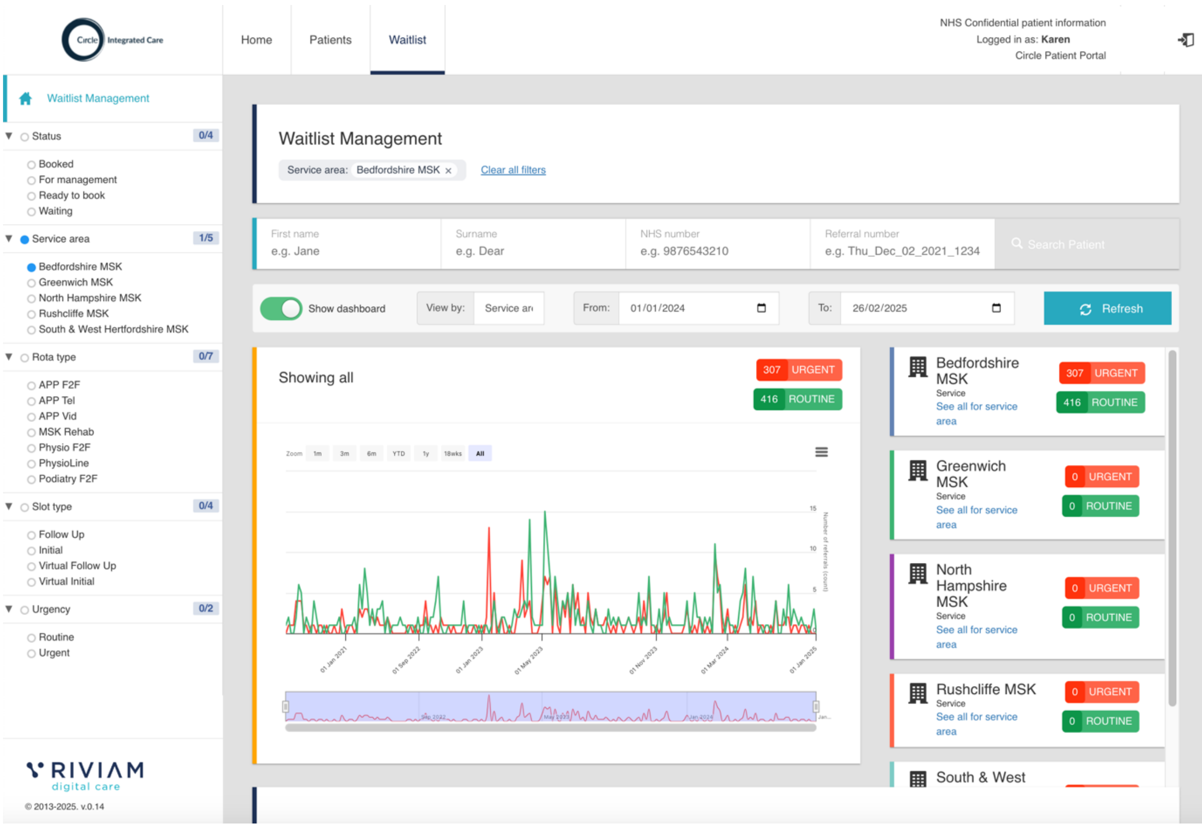

Figure 17: View the Service area dashboard.

To view a list of referrals, you can click on the following:

- The "See all" links in the status card list all the referrals currently assigned to this Service area.
- By red/green flag, see the list of referrals depending on urgency.
- The bars in the central graph (coming soon).

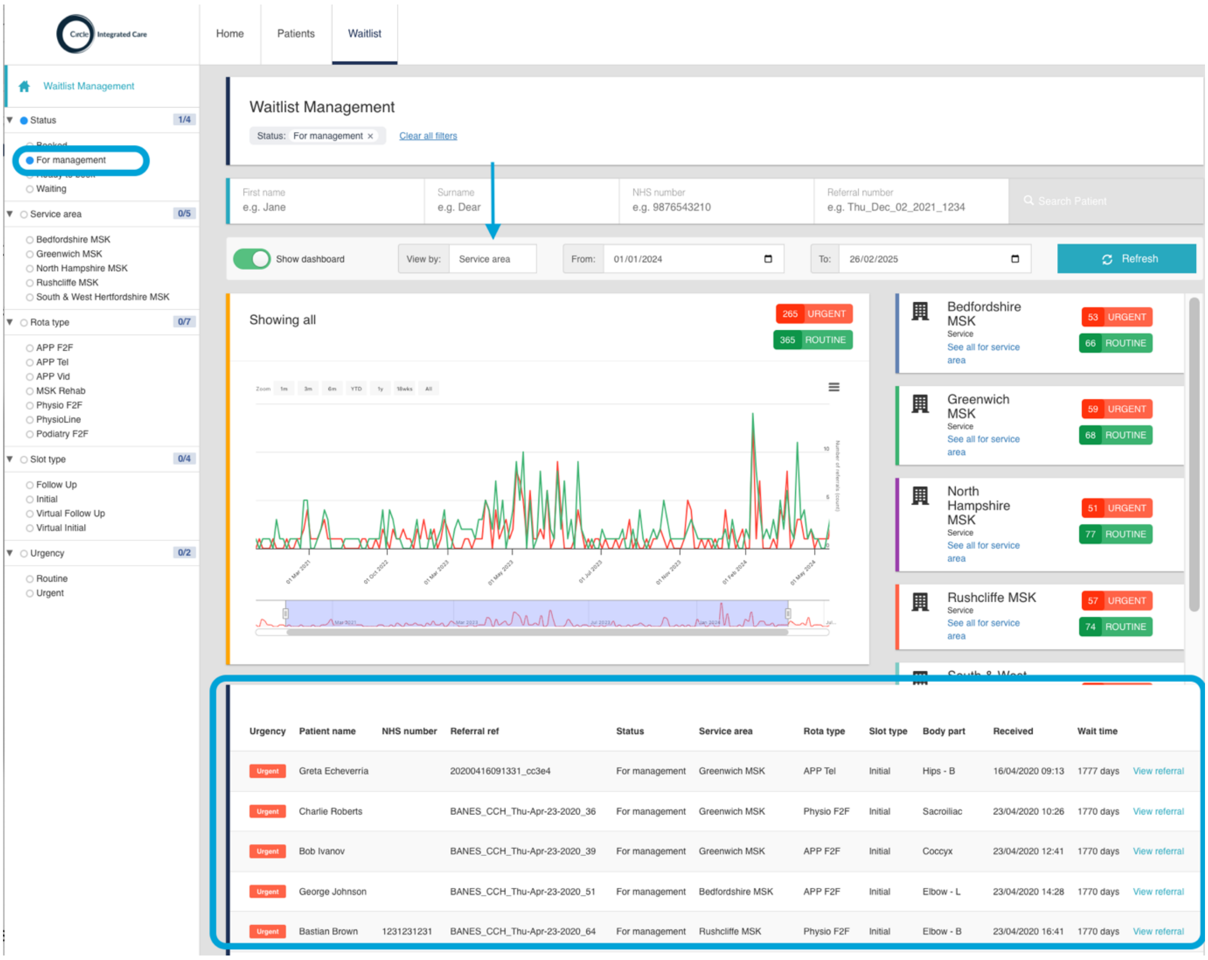

Figure 18: See the list of referrals by Service area dashboard.

To view any individual referrals, please select **View referral.**

8.4 Date range selection

You can choose the date range of referrals as required. To refresh this view, select the **Refresh button**.

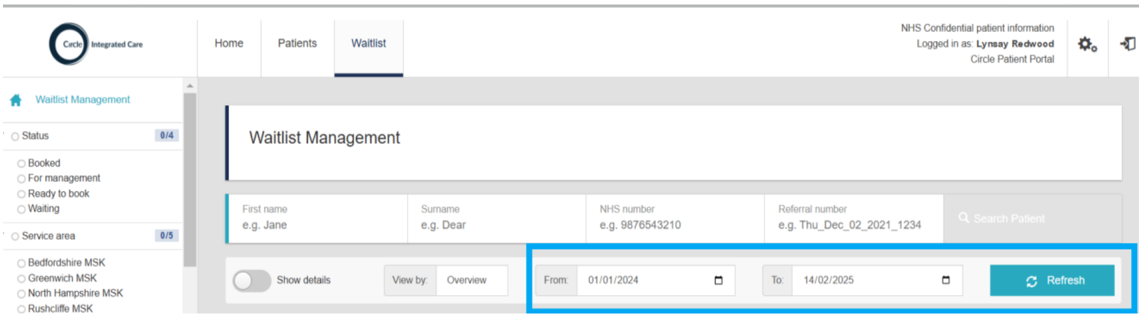

Figure 19: Date range selection.

9 Take action to book an appointment, cancel an appointment, invite a patient to book, or remove a patient from the waitlist

From the waiting list, you can manually book, cancel, or send an invitation to a patient to book their appointment. You can also remove a patient from the waiting list as necessary.

9.1 Book an appointment

To book an appointment for a patient:

- Go to the Waitlist page.
- Search for the patient.
- Find the patient.
- Right-click on the patient information listed, and an actions box will appear as follows:

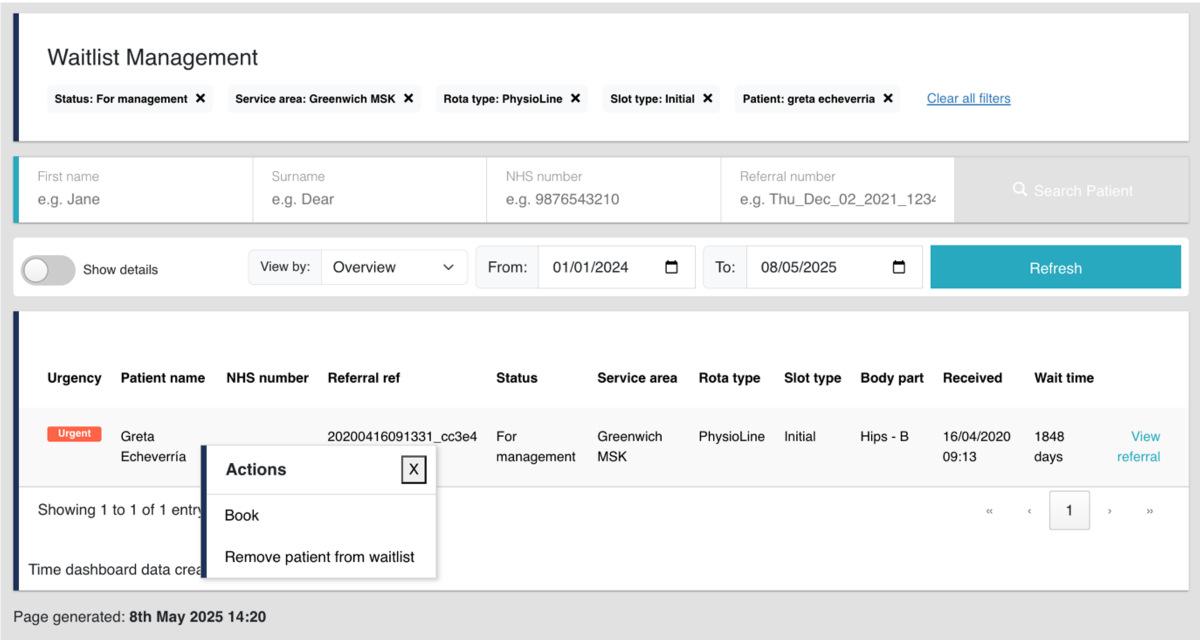

Figure 20: Right-click actions. In this example: Book or Remove patient from waitlist.

A pop-up window will appear as shown below:

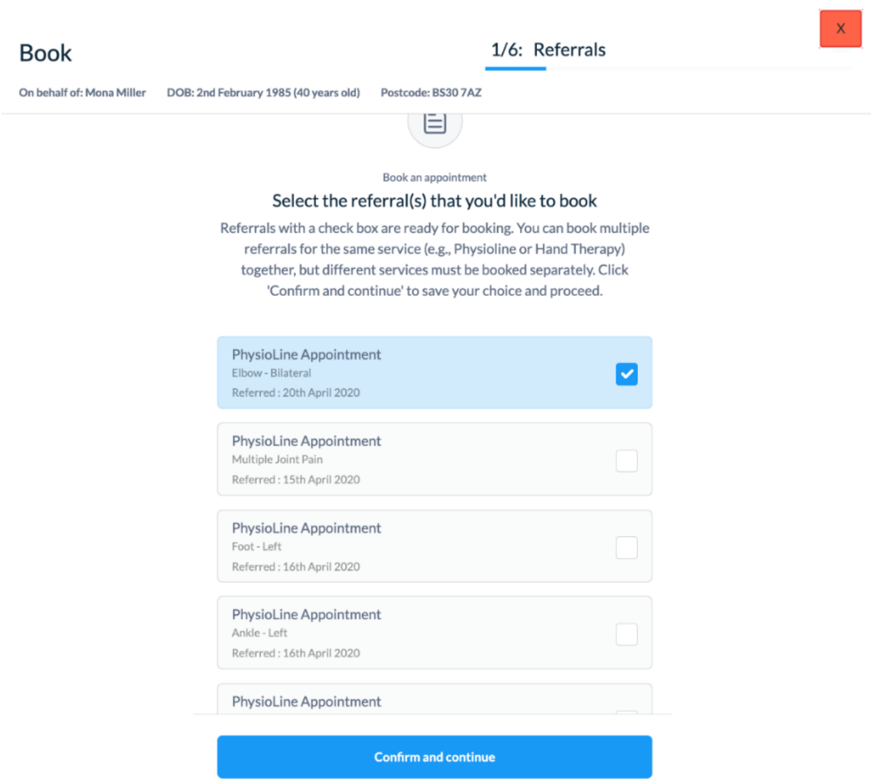

Figure 21: Choose the referral to book an appointment.

Select the location of the appointment as appropriate.

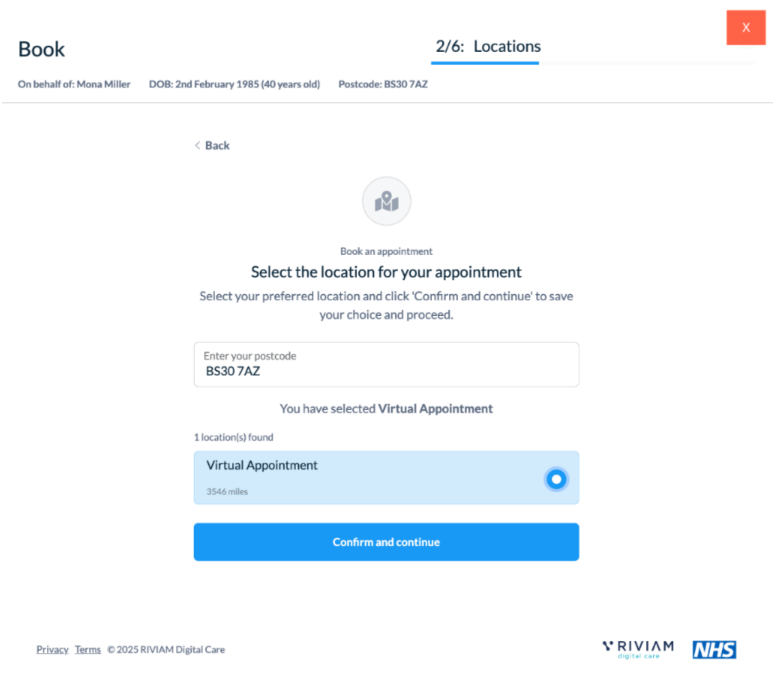

Figure 22: Select the location of the appointment.

Choose the date and timeslot of the appointment.

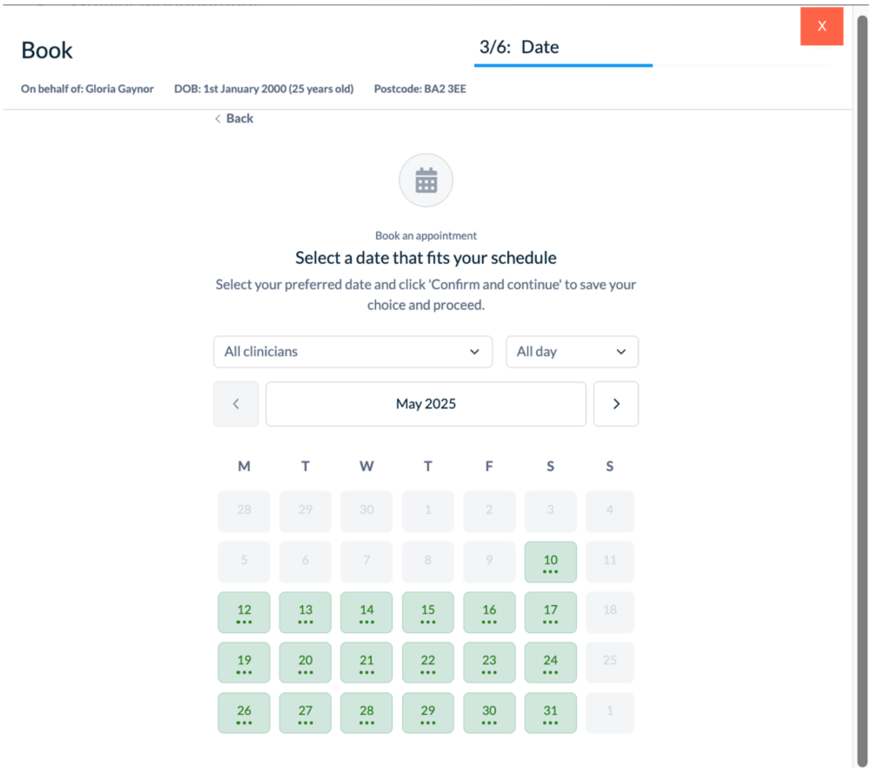

Figure 23: Select date.

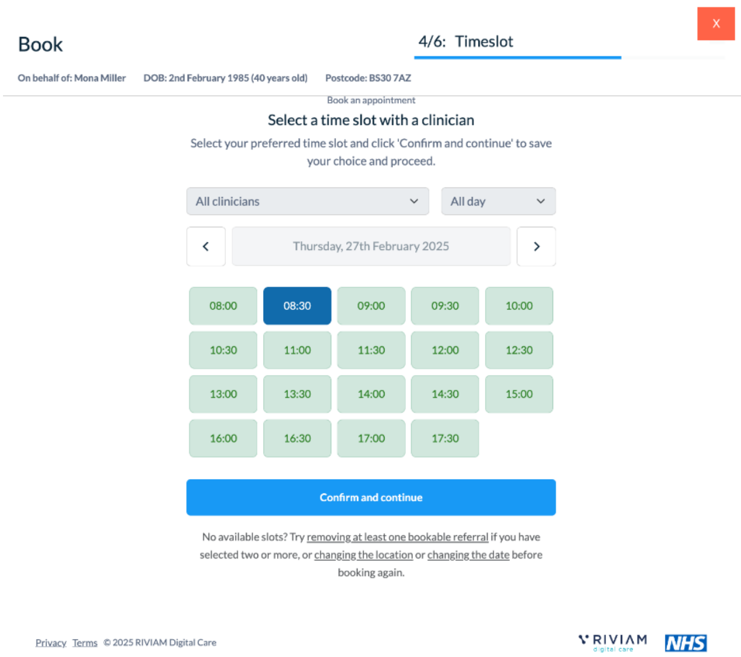

Figure 24: Choose the date and timeslot of the appointment.

Select a clinician for the patient to see.

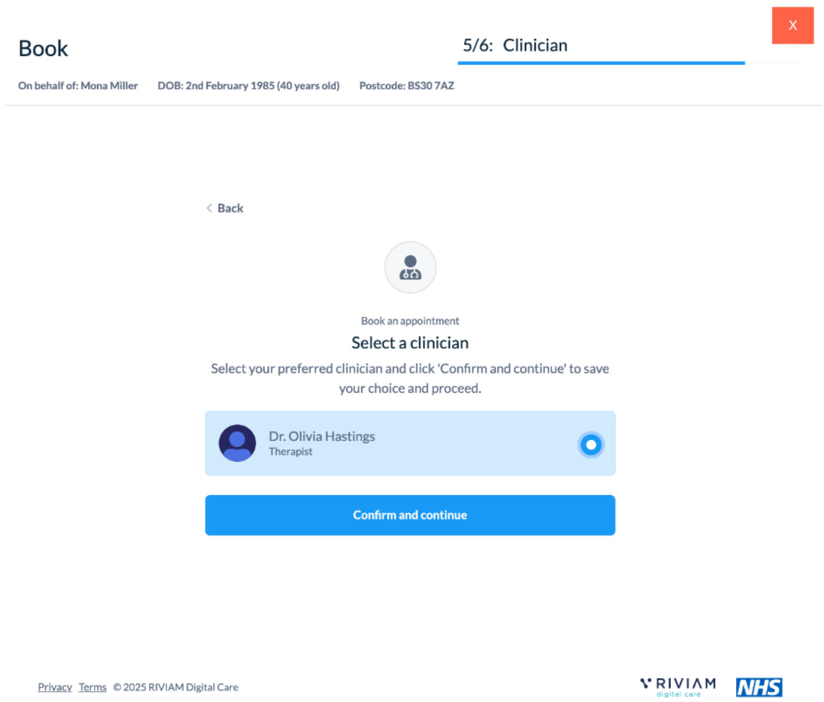

Figure 25: Select a clinician.

Review the selections. Please note that should you wish to make any amendments, you can select the edit symbol on the right to revisit each step in the booking process.

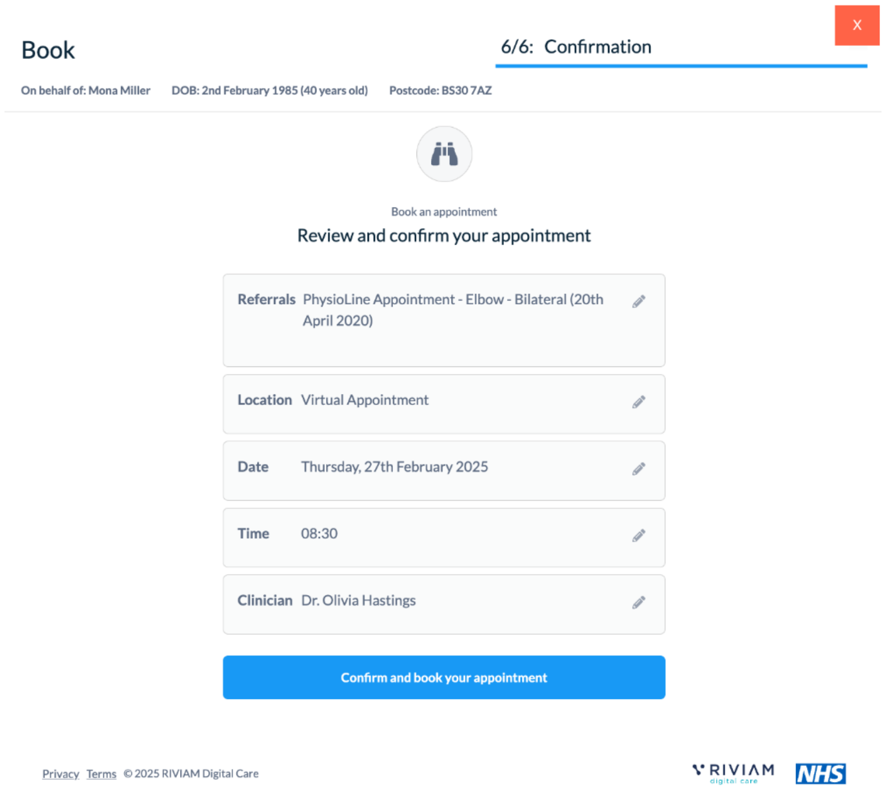

Figure 26: Review the selection and confirm.

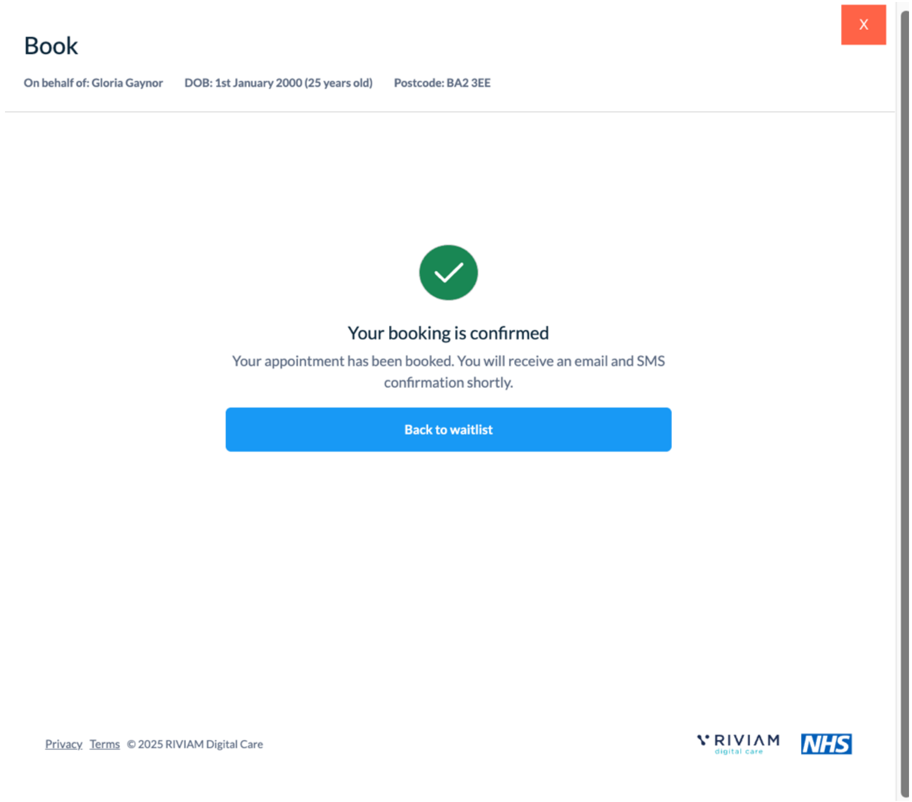

Figure 27: Booking confirmation.

When you open the patient's record, you will see that a timeline event has been created, documenting the date, time, and username of the person who completed the action. If the patient books an appointment via the Patient Portal, a timeline event is also generated.

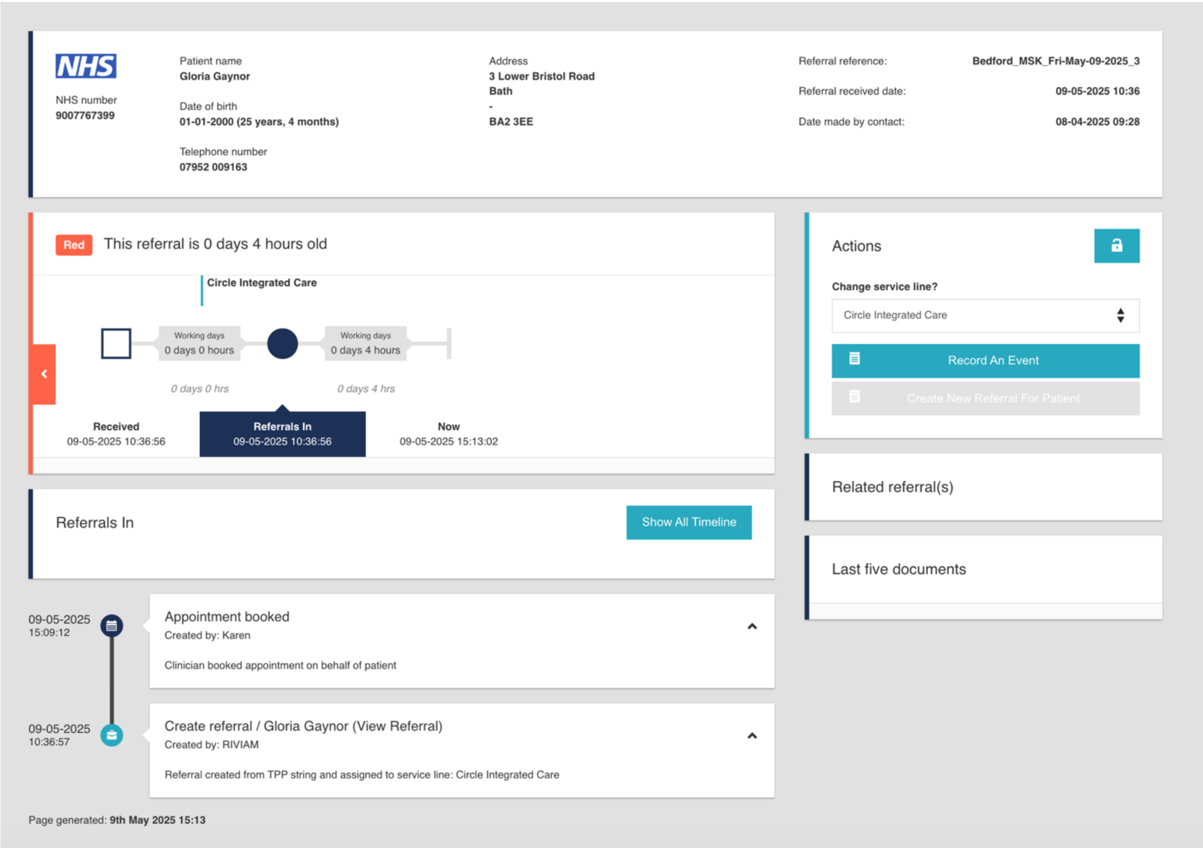

Figure 28: Timeline event created in the referral.

9.2 Cancel an appointment on behalf of a patient

If you need to cancel an appointment on behalf of a patient, find the appointment by searching for the name or patient's referral reference number.

Choose the appointment you would like to cancel and right-click. A pop-up window will appear and select cancel.

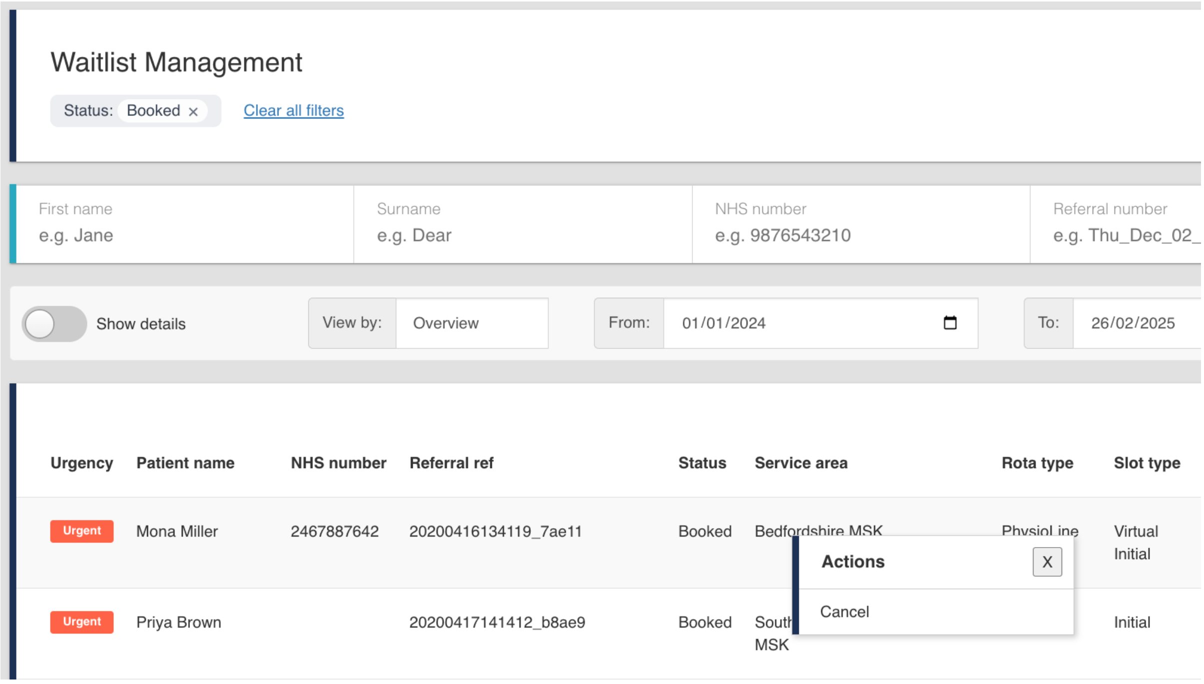

Figure 29: Cancel an appointment..

Another pop-up window will appear.

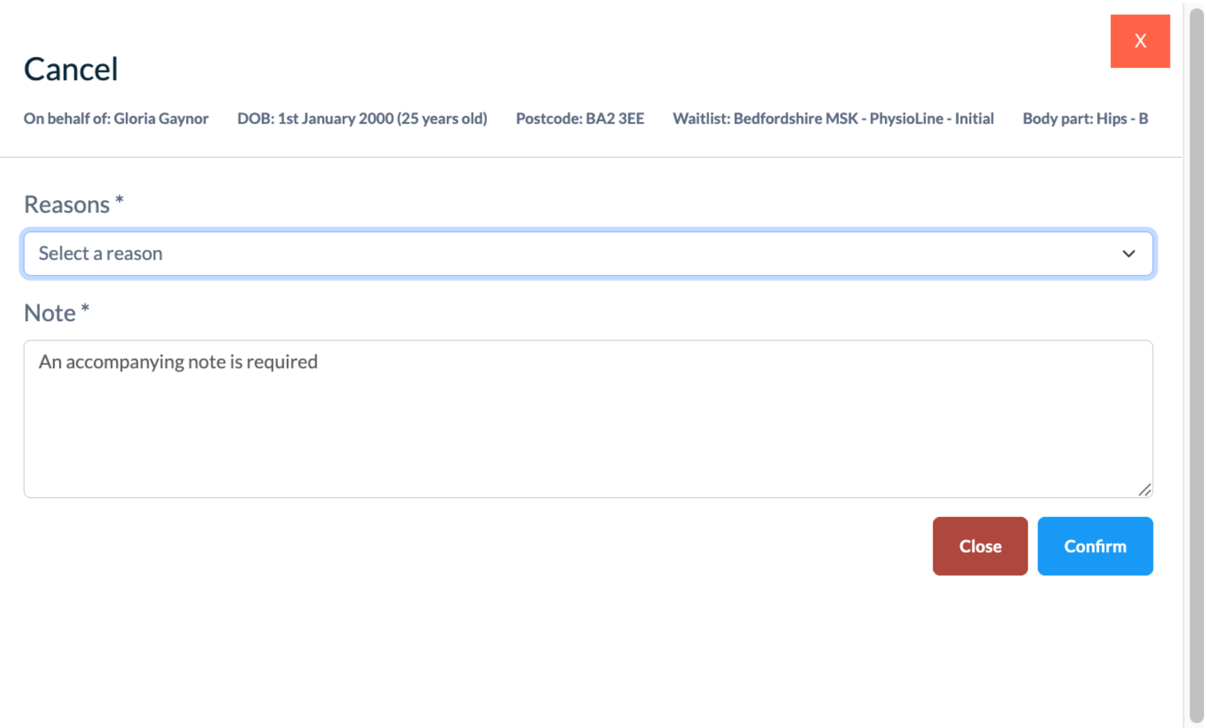

Figure 30: Record a cancellation.

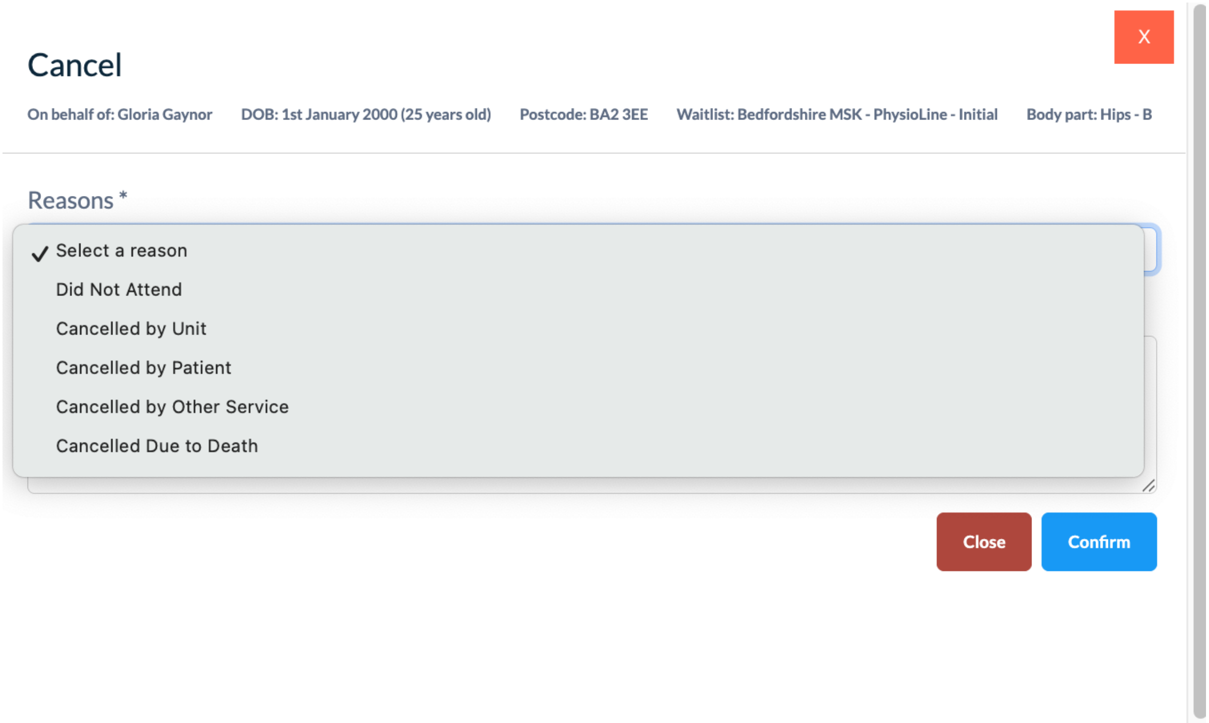

Figure 31: Reasons for cancellation.

You will be asked to provide a reason for cancellation (these reasons are under review and aligned with SystmOne) from a drop-down menu:

- Did Not Attend
- Cancelled by Unit
- Cancelled by Patient
- Cancelled by Other Service
- Cancelled Due to Death.

Select 'Confirm', and the appointment will be cancelled and released for rebooking.

When you open the patient's record, you will see that a timeline event has been created, documenting the date, time, and username of the person who completed the action. The same applies if the cancellation occurs via the Patient Portal.

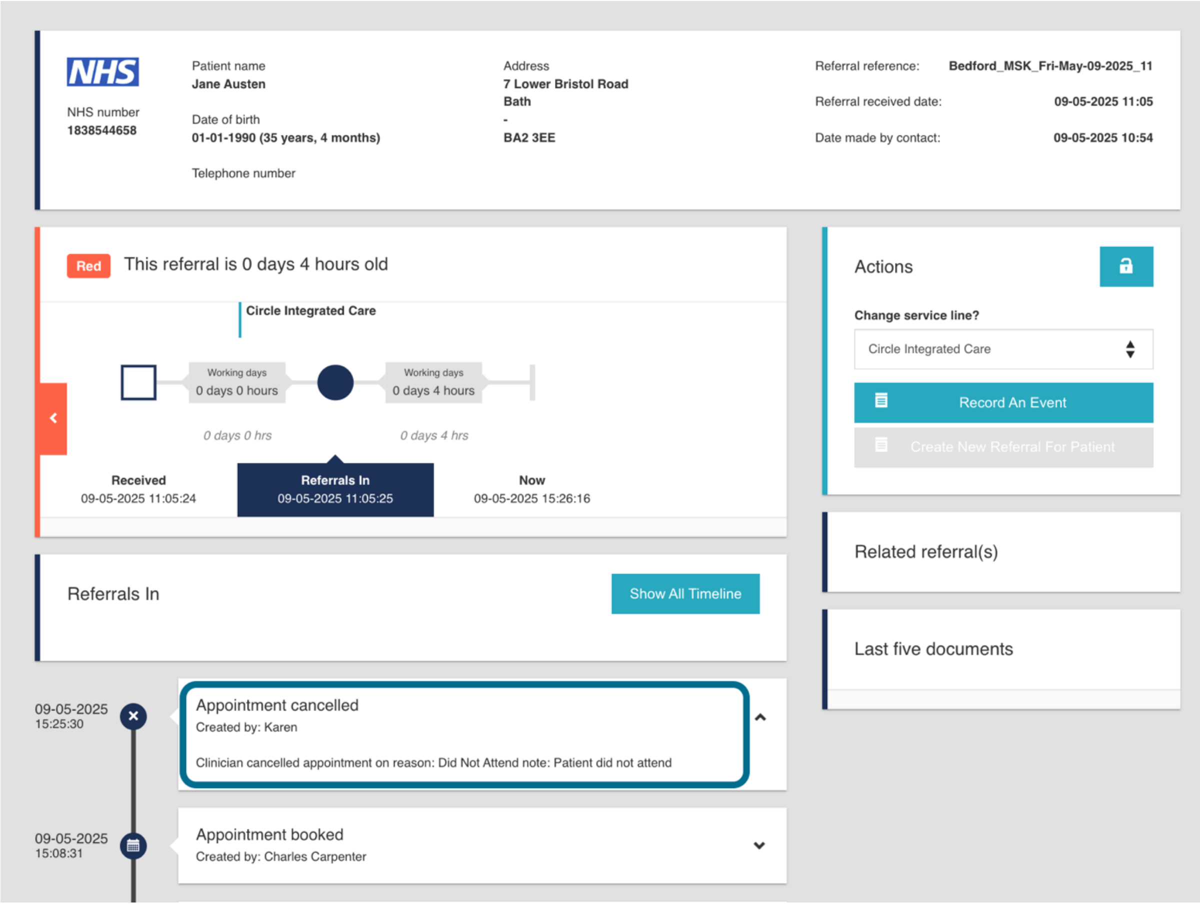

Figure 32: Timeline event.

9.3 Send a patient an invitation to book an appointment via the Patient Portal

If you would like to send a patient on the waiting list an invitation to book an appointment using the Patient Portal.

- Go to the Waitlist page.
- Search for the patient.
- Find the patient on the waiting list.
- Right-click on the patient information listed, and an actions box will appear as follows:

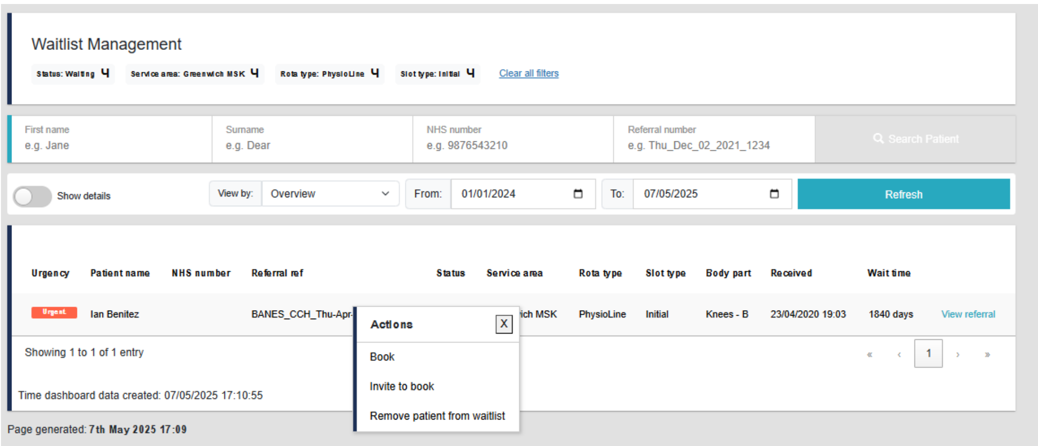

Figure 33: Send an Invite to book.

- Select ‘Invite to book’. A pop-up window will appear. At the top, you will see the patient's details. Select a reason for inviting the patient to book and select ‘Confirm’.

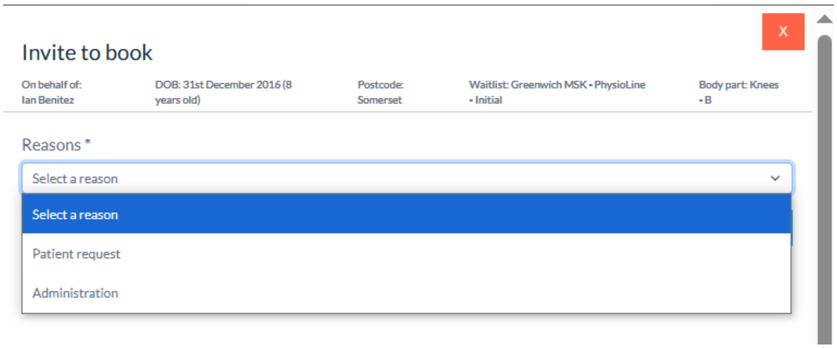

Figure 34: Reason for the invitation to book.

- This action will update the referral status from 'waiting' to 'ready to book'.

The patient will receive an SMS message and/ or an email inviting them to book an appointment by logging into the Patient Portal or as a guest user.

When you open the patient's record, you will see that a timeline event has been created, documenting the date, time, and the name of the person who completed the action. If you open the timeline event, the reason for sending the booking invitation is displayed.

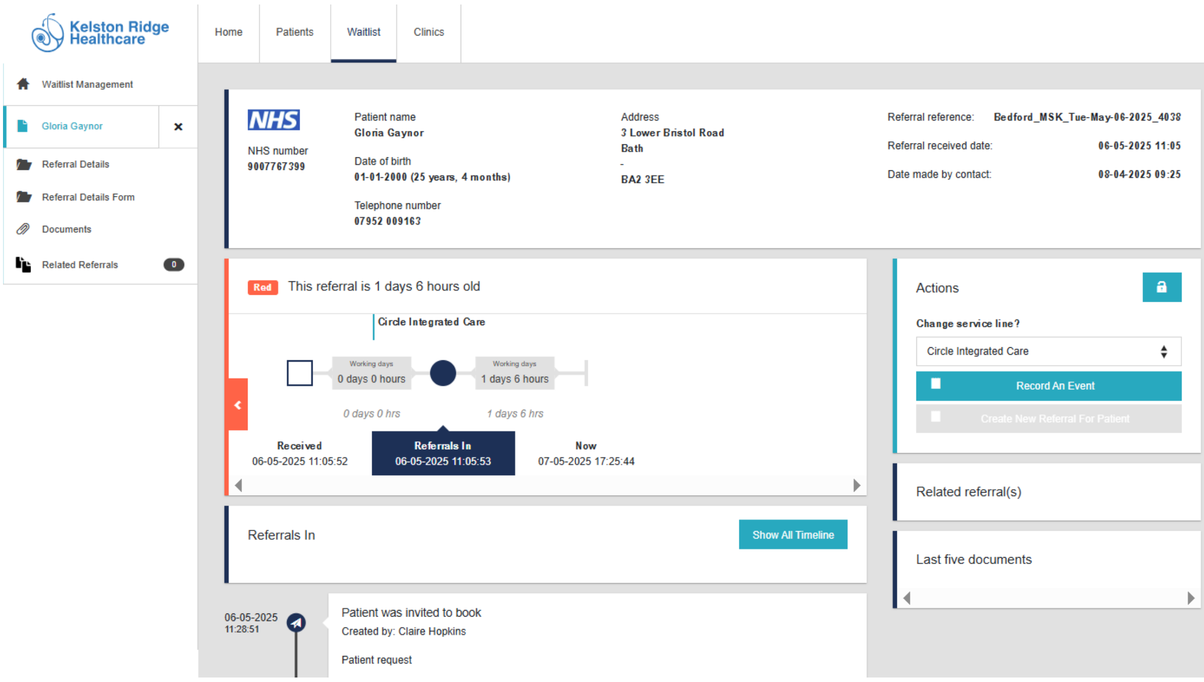

Figure 35: Invitation to book timeline event.

9.4 Remove the patient from the waitlist

- Go to the Waitlist page.
- Search for the patient.
- Find the patient.
- Right-click on the patient information listed and an actions box will appear.
- Select ‘Remove patient from waitlist’ and a pop-up window will appear. At the top, you will see the patient's name, date of birth, postcode, area, rota type and body part.

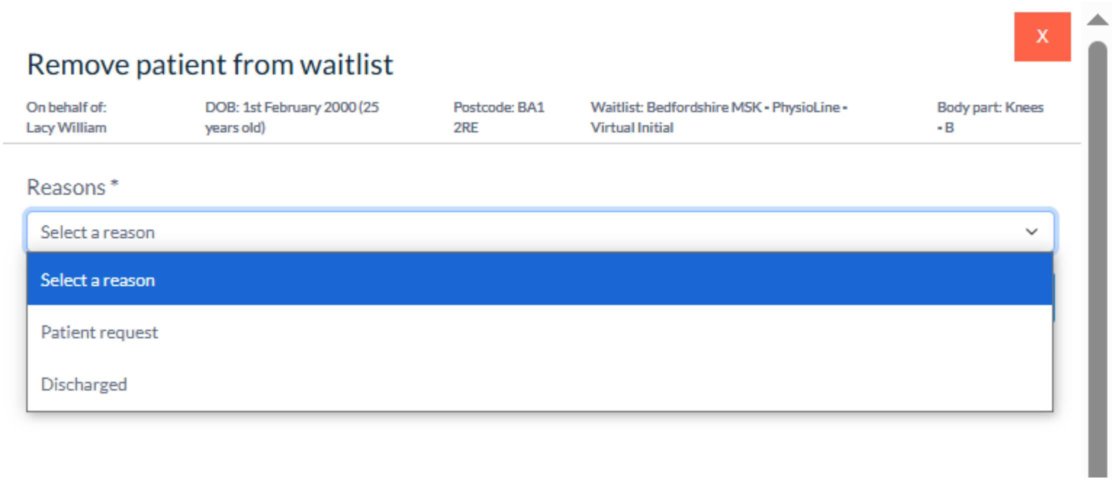

Figure 36: Remove patient from waitlist.

- Select a reason for removing them from the list, i.e. the patient has requested that they be removed from the list, or they have been discharged from the service.
- Select Confirm.
- A timeline event is created in the patient's record, detailing the date and time the waitlist referral was removed, along with the reason.

	This patient's appointment status will be ‘removed’, and their referral will no longer appear on any waiting lists. However, if you need to reinstate the removed referral, see section 6.4.1

10 Clinics

The Clinics page enables you to manage clinic slots by allowing you to cancel entire clinics and/or clinic slots on specific dates, times and locations.

When you open this page, start by selecting a date or date range to load relevant filter options. To select a date range, click on your start date and then click again on the end date. This will display the full date range selected, with intermediate dates highlighted in a different colour.

You can apply multiple filters as needed or use the clinician filter to search for a specific clinician if the list is too long.

You can refine your results by selecting a clinician, rota type, or slot type. When you're ready, click 'Apply filters' to view the results.

Figure 37: Clinic overview.

When filters have been applied, you will see them listed under 'Clinics'

Each column displays the clinic date, clinician name, rota type and location.

Time slots are colour-coded, meaning:

- Green = slot is free.
- Red/ brown = slot removed
- Blue = appointment booked, displaying patient name.

10.1 Cancel a clinic/ individual clinic slot

To cancel a clinic, select the date you would like to cancel, then click Apply Filters. A list of the clinicians scheduled to attend will appear.

To select all clinic slots, click at the top of each column with the date and clinician's name; this will select all the clinic slots for that day. To deselect, simply click on the top of the column again, and the slots will be deselected.

To remove individual clinic slots, select the time slot(s) as needed. Once the desired slots are selected, right-click and an action will appear. Select to cancel the selected slots, and they will be removed.

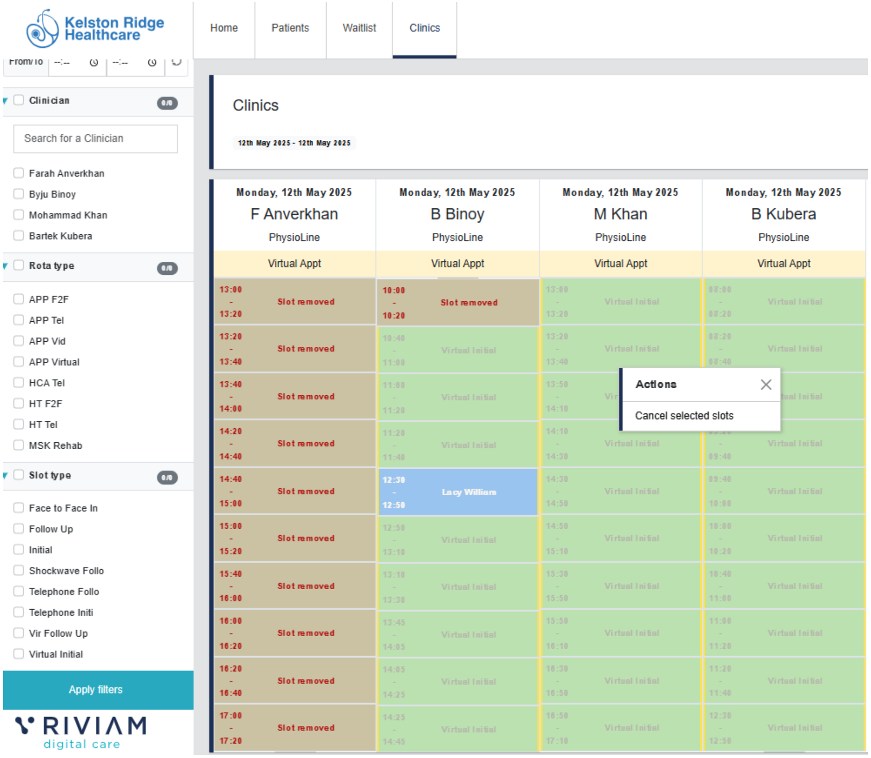

Figure 38: Cancel a clinic/ remove a clinic slot.

Any existing bookings will be cancelled. Patients will be notified by SMS and email that their appointment has been cancelled. The patient's appointment status will change from ‘Booked’ to the status it was prior to the booking, for example, Ready to book or for management. If eligible, the patient may be able to rebook another appointment as soon as possible.

Please ensure that any changes to clinic slots are updated in TPP SystmOne. This is necessary to prevent any removed slots from being reinstated when the daily appointment availability is updated in RIVIAM.

11 What do you do if you need support?

As a new user, it is important that you feel supported and confident when using this functionality. The following areas offer quick access to any help or support you may need.

11.1 Self-help articles and training resources

For quick answers to your questions, RIVIAM has compiled a comprehensive collection of self-help articles and training materials. Explore our Help Centre at RIVIAM.com/Helpcentre as most questions can be answered there.

11.2 Organisational training leads

Your organisation has trained staff who have received comprehensive training on how to use the RIVIAM Waitlist Management platform. For general how-to enquiries, please contact them, as they should be able to support you.

11.3 Technical support

11.3.1 When should you contact RIVIAM Customer Support?

If your organisational training support can’t help or you are experiencing one of the following three issues, then the RIVIAM Customer Support desk should be contacted:

Setting up a new user – If a user experiences any issues logging in to RIVIAM or doesn't have their login details, RIVIAM will provide support.

Technical error messages – If a user encounters technical error messages while working in RIVIAM, we can provide guidance on how to resolve the issue.

Deviations from this user guide – If things are not working as expected and as explained in this guide, RIVIAM will be happy to address any support queries. This user guide will be updated and shared as more functionality is added during the go-live rollout over the next few months.

11.4 How can you contact us?

RIVIAM Customer Support opening hours are Monday through Friday, 9.00 a.m. to 5.30 p.m. Please email support@riviam.zendesk.com.