

Waitlist Management

User guide

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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 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.

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 management**: Effectively handles waitlists, including lastminute cancellations, minimising delays and improving service delivery.
- 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).

Cocke Integrated Care	Home Patients Waltist	NHS Confidential patient information Logged in as: Karen Circle Patient Portal	Ð
RIVIAM news	Current work list Lobed referrals that you are working on There are currently no referrals assigned to you No recent referrals available No recent referrals available		
• RIVIAM digital care			

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.

Circle Integrated Care	Home	Patients	Waitlist	Clinics		NH	S Confidential patient information Logged in as: Lynsay Redwood Circle Patient Portal	¢₀	-10
	P Firs e.g	l'atient finder it name 1. Jane			Sumamo e.g. Dear	NHS number e.g. 9876543210			
	Y	OUT recently s	selected pa	tients ecords recently	r Find a patient above to get started.	Your most accessed patients There is currently no 'most accessed patient's' d list.	ata. Start viewing patients to populat	e this	
Cigital care									

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**.

Crick Integrated Care	Home Patient	s Waitlist						NHS Confidentia Logged i	l patient information n as: Karen Circle Patient Portal	Ð
	Patient fine	der						_		
	First name Mona		S	Sumame Miller		NHS number e.g. 9876543210		Q Sear	ch Patients	
	Search res	sults for 'Mona N	filler'							
	Surname	First name	Identifier	DoB	Age	Sex	Postcode	Warnings		
	Miller	Mona	2467887642	02/02/1985	40 years, 0 months	Not specified	BS30 7AZ	(@)	Select patient	
Cigital care e 2013-2025, v.0.14										

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.

Crst) Integrated Care	Home	Patients	Waitlist							NHS Confidenti Logged	al patient inform in as: Karen Circle Patient F	ation fortal
Q Search Results 1 Mona Miller Show Timeline	NHS 246	788 7642		Patient name Mona Miller Gender Not specified Date of birth 02/02/1985 (40 years, 0	0 months)	Address 12 Bramley Court Bri 7AZ Warnings	istol Barrs Cou	rt Bristol BS30				
	Wa	aitlist refer	rals									
	Urg	Urgent	Referral ref	_7ae11	Status Ready to book	Service area Bedfordshire MSK	Rota type PhysioLine	Slot type Virtual Initial	Body part Ankle - L	Received	Wait time	View referral
		Urgent	BANES_CCH_M	on-Apr-20-2020_20 ed-Apr-22-2020_21	Ready to book Ready to book	Bedfordshire MSK Bedfordshire MSK	PhysioLine PhysioLine	Virtual Initial Virtual Initial	Elbow - B Mult Joint Pain	20/04/2020 12:22 22/04/2020 11:16	1773 days 1771 days	View referral View referral
		Urgent Urgent	BANES_CWH_M	on-Feb-22-2021_305	Ready to book	Bedfordshire MSK Bedfordshire MSK	PhysioLine PhysioLine	Virtual Initial	Hip - R Coccyx	02/12/2020 16:16 22/02/2021 15:00	1547 days 1465 days	View referral View referral
		Urgent			Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Elbow - B	03/03/2021 15:30	1456 days	View referral
V* RIVIAM digital care		Routine	20200415085809 20200415085809	_b7d4e	Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Mult Joint Pain	15/04/2020 08:58	1778 days	View referral
© 2013-2025. v.0.14		Routine	20200416111208	_09c34	Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Foot - L	16/04/2020 11:12	1777 days	View referral

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'.

Home	Patients	Waitlist	Clinics									
1												
	NHS		Patient name Gloria Gayno	or	4 3	ddress Lower Bristol Road Bath	Somenset BA2 31	EE				
NI 90	IS number 0 776 7399		Gender Female									
			Date of birth 01/01/2000 (2	?5 yeara, 4 mont	ha)							
W	/aitlist referra	als										
Ur	gency	Refermal ref			Status	Service area	Rota type	Slot type	Body part	Re œive d	Waittime	
Ŀ	Urgest	Bedford_MSK_T	ue-May-06-202	5_4039	Booked	Bedfordshire MSK	PhysioLine	Initial	Hips - B	06/05/2025 11:05	2 days	View referral
•	Rostine	Bedford_MSK_T	ue-May-06-202	5_4038	Ready to book	Bedfordshire MSK	PhysioLine	Initial	Knees - B	06/05/2025 11:05	2 days	View referral
1.1	Rostine	Bedford_MSK_T	ue-May-06-202	5_4040	Removed	Bedfordshire MSK	PhysioLine	Initial	Foot - R	06/05/2025 11:05	2 days	View referral
Sho	wing 1 to 3 of 3 e	ntries				Actions	x				Previous	1 Next
						Reinstate patient to wai	tlist					

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 information, such as:



The referral header displays the patients:

- **Demographics**, including
 - Name, address, postcode.
 - Date of birth.
 - NHS number.
 - Warnings associated with this referral.
 - Referral reference number.
 - **Referral** received date in RIVIAM.
 - **Date made by contact,** which refers to the date and time the referral request information was received from the clinical system.
- **Referral details section**: A summary of the patient's details, with the ability to make updates as necessary.
- **Related referrals section**: Any related waitlist referrals for this patient with the same demographics will be listed.
- **Documents:** View or download any documents related to or uploaded into this referral.
- **Record an event/upload a document**: Add information to the referral or upload supporting documents.
- **Timeline events:** View previously recorded activity on the referral.

Cercle Integrated Care	Home Patients Waitlist		NH	Confidential patient information Logged in as: Karen Circle Patient Portal
# Waitlist Management				
Mona Miller X	NHS Patient name Mona Miller NHS number Date of birth	Address 12 Bramley Court - - Fistol	Referral reference: Referral received date	BANES_CWH_Wed-May-17-2023_2208 17-05-2023 10:53
 Referral Details Referral Details Form 	8884447575 Date of bind? Not checked Telephone number	months) BS307AZ Warnings	Date made by contact	17-05-2023 10:53
Ø Documents		٣,		
Related Referrals (17)	Red This referral is 1524 days 1	hours old	Actions	a
	Circle Integrated	1 Care	Change servic	> line?
	Working days	Working days	Circle Integra	led Care
	1454 days 7 hours	69 days 3 hours	•	Record An Event
	1696 days 7 hrs	81 days 18 hrs		
	Received Referr 15-04-2020 08:58:00 06-12-2024	als In Now 16:19:52 26-02-2025 10:39:11		
			Related re	erral(s)
	Referrals In	Sh	Now All Timeline Show 10 ~	entries
	L			Referral date Pathway
	25-02-2025 Record unlocked / N 18:14:08 Created by: Matheus	Iona Miller (View Referral)	~ +	16/04/2020 Circle Integrated Care
			+	16/04/2020 Circle Integrated Care
© 2013-2025. v.0.14	25-02-2025 18:13:48 B Created by: Matheus	ia Miller (View Referral)	× +	16/04/2020 Circle Integrated Care

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
 - o Ready to book
 - o 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
 - o Routine
 - Urgent

Healthcare	Home Patients Waitli	st Clinics			
Waitlist Management					
Status 4/4	Waitlist Managem	ent			
Booked For management	Status X - Service area:	Bedfordshire MSK X Rota type X	Slot type: Initial X Urgency 3	X - Clear all filters	
Waiting	First name	Surname	NHS number	Referral number	
Service area 1/5	e.g. Jane	e.g. Dear	e.g. 9876543210	e.g. Thu_Dec_02_2021_1234	
Bedfordshire MSK Greenwich MSK	Show details	View by: Overview	From: 01/01/2024	To: 08/05/2025	Refresh
North Hampshire MSK Rushcliffe MSK	Bedfordshire N	ISK			
Bota type	Initial Fi	ollow-up			
	538 124 0	0			
APP Tel	Urgent Rou	tine			
APP Vid	219 51 31	9 73			
APP Virtual					
HCA Tel					
HT F2F	Page generated: 8th May 2025	14:10			
HT Tel					
MSK Rehab					
Paediatrics MSK					
Physio F2F					
PhysioLine					
Podiatry F2F					
Session					
V RIVIAM					
distinguished and and and a second					

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.

Waitlist Manageme Status × . Service area: Be	nt odfordshire MSK × Rota type × 🗸	Slot type: Initial X Urgency X •	Clear all filters	
First name e.g. Jane	Surname e.g. Dear	NHS number e.g. 9876543210	Referral number e.g. Thu_Dec_02_2021_1234	Q Search Patient
Show details	View by: Voverview Status Service area	From: 01/01/2024	To: 08/05/2025 🗖	Refresh

Figure 11: Dashboard options 'View by'.

- o 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:

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Kelston Ridge Healthcare	Home Patients	Waitlist Clinic	s						
Waitlist Management									
Status 0/4	Waitlist Mar	nagement							
Booked For management Ready to book Waiting	First name e.g. Jane	Surname e.g. De	ar	NHS e.g. s	number 9876543210	Re e.ç	ferral number g. Thu_Dec_02_2021	_1234	Q Search Patient
Service area		Minur bur	Quantian	Eromi	01/01/2024	Ter	08/05/2025	_	Defeat
Bedfordsnire MSK Greenwich MSK North Hampshire MSK Rushcliffe MSK South & West Hertfordshire MSK									t t
Rota type					Ready to book	•	Waiting	Urgent	Routine
APP F2F	Bedfordshire MS	SK							
APP Vid	PhysioLine - Initi	al			320 124	4	0	135 <mark>51</mark>	184 <mark>73</mark>
APP Virtual HCA Tel	PhysioLine - Foll	low Up			111 40		0	55 ¹⁸	56 22
HT F2F	Total for Bedfor	dshire MSK			431 164	1	0	190 ⁶⁹	240 <mark>95</mark>
MSK Rehab	Greenwich MSK	<							
Physio F2F	PhysioLine - Initi	al			282 117	7	1	108 <mark>52</mark>	175 <mark>65</mark>
PhysioLine Podiatry F2F	PhysioLine - Foll	low Up			109 41		0	57 23	52 18
Session	Total for Green	wich MSK			391 158	3	1	165 75	227 83
	North Hampshir	e MSK							
N RIVIAM	PhysioLine - Initi	al			288 113	3	0	121 44	167 69

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).

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Creck Integrated Care	Home Patients	Waitlist Clin	ics							NHS (Confidential pa Logged in a Cir	atient information s: cle Patient Portal		শ্
# Waitlist Management														
▼ OStatus	Waitlist Mana	agement												
Booked For management Ready to book Walting	Rota type 🛩 😋	ear all filters	Surname		NHS numb	or			Referral number					
▼ O Service area 05	e.g. Jane		e.g. Dear		e.g. 98765	543210			e.g. Thu_Dec_02_2021_1234					
 Bedfordshire MSK Greenwich MSK North Hampshire MSK 	Show details		View by: Overview	•	From: 01/	01/2024	٥	To:	09/05/2025	•		Refresh		I
 Rushcliffe MSK South & West Hertfordshire MSK 													Ŧ	
V Rota type 14/14														
APP F2F APP Tel APP Virt	Bedfordshire MSK	(Ready	to book	•	+	Waiting	Urgent	•	Routine		
HCA Tel	PhysioLine - Initial					13 0			0	20		11 0		
 HT F2F HT Tel 	Total for Bedfords	hire MSK				13 0			0	20		11 0		
 MSK Rehab Paediatrics MSK 	Greenwich MSK													
Physio F2F Physiol inc	PhysioLine - Initial					0 0			1	0 0		1 0		
 PhysioLine Podiatry F2F 	Total for Greenwic	ch MSK				0 0			1	0 0		1 0		
Session Shockwaye	North Hampshire I	MSK												
USS/USGI F2F	PhysioLine - Initial					0 0			1	1 0		0 0		
▼ OSlot type 02	Total for North Har	mpshire MSK				0 0			1	1 0		0 0		
 Initial Follow Up 	All contracts:					13 0			2	3 0		12 0		
	Showing 1 to 6 of 6 e	entries									63	← 1 →	ю	
© 2013-2025. v.0.14	Page generated: 9th May	y 2025 14:54												

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.

Circle Integrated Care	Home	Patients	Waitlist						1	NHS Confidentia Logged	I patient inf in as: Karer Circle Patie	ormation n ent Portal	-1
 ₩aitlist Management Status 		/aitlist Man	agement										
 Booked For management Ready to book Waiting 	First	name		Surname		NHS number		Referral nu	mber	0001 100	Q. Sear	ch Patient	
Osrvice area Of Bedfordshire MSK Greenwich MSK North Hampshire MSK Rushcliffe MSK South & West Hertfordshire MSK		Show dashboa	rd View by	e.g. Dear y: Status	From:	e.g. 9876543210		e.g. Thu_	2025	Waiting		🗯 Refresh	
Rota type Rota type APP F2F APP F2f APP Vid MSK Rehab Physio F2F PhysioLine Podiatry F2F	24 	nowing all	YTD 1y 14	Suts All			1429 UR 1923 ROU		â	On the waiting li invitation to boo appointment See all on the list Ready to Patients with ac invitations to bo appointment	st for their c an waiting book ive bk an	773 URGENT 992 ROUTINE 72 URGENT 100 ROUTINE	
Slot type Slot type Follow Up Initial Virtual Follow Up Virtual Initial Urdency	-	Inmpor	M. present	Mehmellew		wallallall		40 20 20		Booked Completed patie bookings See all compl bookings	nt eted	207 URGENT 324 ROUTINE	
Cautine		s ^{oortoo}	61 ¹⁶⁶ 90 ²⁷ 61 ⁰⁰⁰	e ^{nde} end ^{ede}	4.)WM.	500 ⁵⁰⁵ 546	er ^{och} or we	555 1		For managem Patients invited but have yet to o their booking See all in nee management	io book komplete d of	265 URGENT 365 ROUTINE	

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.



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:** 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.

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.

Circle Integrated Care	Home Patients Wait	itlist		NHS Confi Lo	dential patient information gged in as: Karen - 2 Circle Patient Portal
A Waitlist Management	_				
▼ ⊖ Status 0/4	Waitlist Managen	ment			
 Booked For management Ready to book Waiting 	Service area: Bedfordshin	re MSK x Clear all filters			
▼ • Service area 1/5	First name	Surname	NHS number	Referral number	
Bedfordshire MSK Greenwich MSK North Hampshire MSK Rushclifd MSK South & West Hertfordshire MSK	Show dashboard	View by: Service an From:	01/01/2024	e.g. fmu_bec_b2_c0c1_1234 To: 26/02/2025	D 🗘 Refresh
▼ ○ Rota type 0/7			207.11	Bedford	shire
APP F2F APP Tel APP Vid MSK Rehab Physio F2F PhysioLine	Showing all	ty 19aks AB	416 R0	MOENTINE MSK Service See all fors area	418 ROUTINE
O Podiatry F2F				MSK Septer	0 URGENT
▼ OSlot type 0/4				15 See all for s	0 ROUTINE
 Follow Up Initial Virtual Follow Up Virtual Initial 				10 references to a second and a	ire <u>o urgent</u>
Orgency Orzency Orzency Orzency Orzent	A March March	ndAkhan hand lind "V IVIMMAA		Service See all for s area	0 ROUTINE
	¢r \$*	ar ar	or or o'	Rushclift Service See all for s area	fe MSK 0 URGENT ervice 0 ROUTINE
S* RIVIAM digital care				South &	West
© 2013-2025. v.0.14					

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**.

Circle Integrated Care		Home	Patients	Waitlist				NHS Cor Logg	nfidential patient information ed in as: Lynsay Redwood Circle Patient Portal	¢.	-10
🐈 Waitlist Management	^										
⊖ Status	0/4	V	/aitlist Mar	nagement							
 Booked For management Ready to book Writing 			t pomo		Cumama		NUC sumber	Deferred number			
 Service area 	0/5	e.g.	. Jane		e.g. Dear		e.g. 9876543210	e.g. Thu_Dec_02_2021_1234	Q, Search Patient		
 Bedfordshire MSK Greenwich MSK North Hampshire MSK Rushcliffe MSK 		0	Show details	Vie	w by: Overview	From:	01/01/2024	To: 14/02/2025	C C Re	resh	

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:

Status: Fo	or management ×	Service area: G	areenwich MSK 🗙	Rota ty	pe: PhysioLine 🗙	Slot type: Initia	×	Patient: greta eche	verria 🗙 🖸	Clear all filters	
First name e.g. Jane		Surnam e.g. De	ie ear		NHS number e.g. 987654	3210		Referral number e.g. Thu_Dec_0	2_2021_1234	, c	C Search Patient
Sho	w details	View by:	Overview	•	From: 01/01	1/2024 🗖	To:	08/05/2025			Refresh
Urgency	Patient name	NHS number	Referral ref		Status	Service area	Rota t	type Slot type	Body part	Received	Wait time
Urgency	Patient name Greta Echeverría	NHS number	Referral ref 20200416091331_ X	_cc3e4	Status For management	Service area Greenwich MSK	Rota t	sype Slot type	Body part Hips - B	Received 16/04/2020 09:13	Wait time 1848 Viet days referra

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

A pop-up window will appear as shown below:



_

On behalf of: Mona Miller DO	B: 2nd February 1985 (40 years old) Postcode: BS30 7AZ	
	Book an appointment	
	Select the referral(s) that you'd li	ke to book
	Referrals with a check box are ready for booking. referrals for the same service (e.g., Physioline together, but different services must be booke 'Confirm and continue' to save your choice	You can book multiple or Hand Therapy) ‹d separately. Click a and proceed.
	PhysioLine Appointment Elbow - Bilateral Referred : 20th April 2020	
	PhysioLine Appointment Multiple Joint Pain Referred : 15th April 2020	
	PhysioLine Appointment Foot - Left Referred : 16th April 2020	
	PhysioLine Appointment Ankle - Left Referred : 16th April 2020	
	PhysioLine Appointment	

Figure 21: Choose the referral to book an appointment.

Select the location of the appointment as appropriate.

Book	2/6: Location	าร	-
On behalf of: Mona Miller DOB:	2nd February 1985 (40 years old) Postcode: BS30 7AZ		
	< Back		
	191		
	Book an appointment		
	Select your preferred location and click 'Confirm and continue' your choice and proceed.	e' to save	
	Enter your postcode BS30 7AZ		
	You have selected Virtual Appointment		
	1 location(s) found		
	Virtual Appointment 3546 miles	0	
	Confirm and continue		
D.1	Disited Gran		

Figure 22: Select the location of the appointment.



Choose the date and timeslot of the appointment.

					3/0:	Date		
On behalf of: Gloria Gaynor	DOB: 1st January 200	00 (25 years	old) Posto	code: BA2 3EE				
			Book	an appointme	ent			
	Select you	Selec	t a date t	hat fits y	our sch	nedule	2 5 2 V 9 V 0 U F	r
	Sciect you	rpreferre	choic	e and proce	eed.	ontinue to	Jave your	
	All clinici	ans			•	All day	~	
	<			May 2025			>	
	м	т	W	т	F	S	S	
						3		
						10	11	
	12	13	14	15	16	17	18	
	19	20	21	22	23	24	25	
	26	27	28	29	30	31	1	
3: Select date.								
Book					4/6:	Timeslo	t	
On behalf of: Mona I	Miller DOB: 2nd Februa	ary 1985 (40 y	rears old) Po	ostcode: BS30 7	AZ			
			Select a tir	ne slot wit	h a clini	cian		
	Sele	ct your prei	your	choice and pr	connrm a roceed.	ina continue	to save	
	All	clinicians			*	All day	~	
	<		Thursda	ıy, 27th Febru	iary 2025		>	
	c	08:00	08:30	09:00	09:	30 1	.0:00	
		10:30	11:00	11:30	12:0	00 1	.2:30	
		13:00	13:30	14:00	14::	30 1	.5:00	
		16:00	16:30	17:00	17:	30		
			Co	nfirm and cont	tinue			

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

Select a clinician for the patient to see.



	Book				5/6: Clinician		×
	On behalf of: Mona Miller	OOB: 2nd February 198	35 (40 years old)	Postcode: BS30 7AZ			
		< Back					
				.			
		Select you	ur preferred cli Y	Book an appointmen Select a clinicia nician and click 'Co pur choice and proc	t an infirm and continue' to save :eed.		
		0	Dr. Olivia Has Therapist	tings	0		
				Confirm and contin	ue		
	Privacy Terms @ 2025 Pil	/IAM Digital Care				VRIVIAM	NHS
	FILVACY TELIIS © 2025 KI	NAM Digital Care				digital care	MAS
Figure 25: S	Select a clinicia	an.					

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.

BOOK		6/6: Co	minmation	
On behalf of: Mona Miller DOB: 2r	nd February 1985	(40 years old) Postcode: BS30 7AZ		
		Ä		
		Book an appointment		
		Review and confirm your appointme	ent	
	Referrals	PhysioLine Appointment - Elbow - Bilateral April 2020)	(20th 🥒	
	Location	Virtual Appointment	Ø	
	Date	Thursday, 27th February 2025	ø	
	Time	08:30	Ø	
	Clinician	Dr. Olivia Hastings	Ø	
		Confirm and book your appointment		

Figure 26: Review the selection and confirm.



SOOK				
n behalf of: Gloria Gaynor	DOB: 1st January 2000 (25 years old)	Postcode: BA2 3EE		
	Your	booking is confirmed		
	Your appointment has be	een booked. You will receive an email and SMS confirmation shortly.		
		Back to waitlist		
Privacy Terms © 2025 R	IVIAM Digital Care		V RIVIAM	NHS

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.

NHS number 9007767399	Patient name Gloria Gaynor Date of birth 01-01-2000 (25 years, 4 months) Telephone number 07952 009163	Address 3 Lower Bristol Road Bath - BA2 3EE	Referral reference: Referral received date: Date made by contact:	Bedford_MSK_Fri-May-09-2025_3 09-05-2025 10:36 08-04-2025 09:28
Red This refe Received 09-05-2025 10:36:3 Referrals In	erral is 0 days 4 hours old Circle Integrated Care Working days 0 days 0 hours 0 days 4 hours 0 days 6 hrs 0 days 7 hours 0 days 7	Now 05-2025 15:13:02 Show All T	Actions Change service Circle Integral	a stine? ted Care
-05-2025	Appointment booked Created by: Karen Clinician booked appointment on behalf of patient Create referral / Gloria Gaynor (View Refe Created by: RIVIAM	erral)	•	

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 referral reference number.

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

Waitlist Management Status: Booked × <u>Clear all</u>	t <u>Il filters</u>						
First name	Su	irname		NHS number		Refer	ral number
e.g. Jane	е.	g. Dear		e.g. 9876543210		e.g.	Thu_Dec_02_
Show details	View by:	Overview	om: 0	1/01/2024		To:	26/02/2025
Urgency Patient name N	IHS number	Referral ref	Si	tatus Service area	Rot	a type	Slot type
Urgent Mona Miller 2	2467887642	20200416134119_7ae11	B	ooked Bedfordshire MSK Actions	Phv	siol ine X	Virtual Initial
Urgent Priya Brown		20200417141412_b8ae9	В	ooked South Cancel MSK			Initial

Figure 29: Cancel an appointment..

Another pop-up window will appear.

Cancel On behalf of: Gloria Gaynor	DOB: 1st January 2000 (25 years old)	Postcode: BA2 3EE	Waitlist: Bedfordshire MSK - PhysioLine - Initial	X Body part: Hips - B
Reasons *				
Select a reason				Ť
An accompanying not	e is required			
			Close	Confirm

Figure 30: Record a cancellation.



n behalf of: Gloria Gaynor	DOB: 1st January 2000 (25 years old)	Postcode: BA2 3EE	Waitlist: Bedfordshire MSK - PhysioLine - Initial	Body part: Hips -
easons *				
 Select a reason 				
Did Not Attend				
Cancelled by Unit				
Cancelled by Patien	t			
Cancelled by Other	Service			
Cancelled Due to De	eath			
			Chara	Carter
			Close	Connrm

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:

Waitlist Management suits: Waltsy 4 service and: Greeswice MSK 4 now ype: Physici	4 siotype: initial 4 <u>Clear all filters</u>	
First name Sumame e.g. Jane e.g. Dear	NHS number Referral num e.g. 9876543210 e.g. Thu_Do	ver Q. Search Patient
Show details View by: Overview	✓ From: 01/01/2024	25 🗖 Refresh
Urgency Patientname NHS number Referral ref	Status Service area Rota type Slot type	Body part Received Wait time
Urgest Ian Benitez BANES_CCH_Thu-Apr	Actions X ich MSK PhysioLine Initial	Knees - B 23/04/2020 19:03 1840 days View referral
Showing 1 to 1 of 1 entry	Book	« < 1 > »
Time dashboard data created: 07/05/2025 17:10:55 Page generated: 7th May 2025 17:09	Invite to book Remove patient from waitlist	

Figure 33: Send an Invite to book.

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 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'.

n behalf of: n Benitez	DOB: 31st December 2016 (8 years old)	Postcode: Somerset	Waitlist: Greenwich MSK - PhysioLine - Initial	Body part: Knees - B
leasons *				
Select a reason				~
Select a reason				
Patient request				
Administration				

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.

Kelston Ridge Healthcare	Home Patients Waltist Clinics	
A Waitlist Management		
Gloria Gaynor 🗙	Patient name Address Gloria Gaynor 2 Lower Bristol Road	Referral reference: Bedford_MSK_Tue-May-06-2025_4038
Er Referral Details	NHS number Bath 9007767399 Date of birth - 01.01.2000 (25 years 4 months) -	Date made by contact: 08-04-2025 09:25
Referral Details Form	Telephone number	
Documents	07952 009163	
Related Referrals	Red This referral is 1 days 6 hours old Gride Integrated Care Unowing days 0 days 0 hours 0 days 0 hrs 1 days 6 hours 0 days 0 hrs 1 days 6 hrs	Actions
	06-05-2025 11:05:52 06-05-2025 11:05:53 07-05-2025 17:25:44	Related referral(s)
	Referrals In Show Al Timeline	Last five documents
	06-05-2025 11/28.51 Patient was invited to book Created by: Claire Hopkins Patient request	∢ →

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.

n behalf of: acy William	DOB: 1st February 2000 (25 years old)	Postcode: BA1 2RE	Waitlist: Bedfordshire MSK - PhysioLine - Virtual Initial	Body part: Knees • B
easons *				
Select a reason				~
Select a reason				
Patient request				
Discharged				

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 effectively manage clinic slots by allowing you to cancel entire clinics and/or adjust clinician availability 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.

Kelston Ridge Healthcare	Home Patients Waitlis	st Clinics						NHS Confidential pa Logged in as: Ly RMU	tient information nany Redwood AM Test Domain
 	Clinics 12m Way 2025 - 15m Way 2025								
5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	Meeday, 12th May 2025	Thursday, 15th May 2025	Monday, 12th May 2925	Saturday, 17th May 2025	Monday, 12th May 2025	Thursday, 15th May 2025	Monday, 12th May 2025	Tuesday, 13th May 2025	Wednesday, 14t
	F Anverkhan	F Anverkhan	B Binoy	B Binoy	M Khan	M Khan	B Kubera	B Kubera	B Kub
	PhysioLine	PhysioLine	PhysioLine	PhysioLine	PhysioLine	PhysioLine	PhysioLine	PhysioLine	PhysioL
	Virtual Appt	Virtual Apot	Virtual Appt	Virtual Appt	Virtual Acot	Virtual Appt	Virtual Appt	Virtual Appt	Virtual A
▼ Time range	12:00	12.00	00:00	02:00	12:00	00:00	82:00	02:00	08:20
	- Slot removed	- Virtual Initial	- Virtual Initial	- Virtual Initial	- Virtual Initial	- Slot removed	- Virtual Initial	- Virtual Initial	- Virtual
	13:20	13.20	00:20	02:20	13:20	05:20	87:20	02:20	07:00
Clinician	13:28	13:24	08:20	02:20	13:28	03:20	08:20	02:20	02:40
	- Slot removed	- Victual Initial	- Virtual Initial	- Victual Initial	- Virtual Initial	- Slot removed	- Virtual Initial	- Virtual faither	- Virtual
	13:40	17:40	08:40	02:40	13:48	03:40	08:40	02:40	05:00
Search for a Clinician	12:40	12:40	02:40	02:40	12:58	00:40	02:40	02:40	09:20
	- Slot removed	- Virtual Initial	- Virtual Initial	- Virtual Ini Bal	- Virtual Initial	- Slot removed	- Virtual Initial	- Virtual Initial	- Virtual
	14:00	14:00	05:30	03:00	14:18	09:30	03:00	05:00	09:40
Farah Anverkhan Byju Binoy	14:20	14:28	09:20	83:28	14:19	09:20	09:20	09:20	05:40
	- Slot removed	- Virtual Initial	- Slot mmoved	- Virtual Initial	Virtual Initial	- Slot removed	- Virtual Initial	- Virtual Initial	- Virtual
	14:40	14:48	09:40	83:48	14:39	09:40	09:40	09:40	10:00
Bartek Kubera Sajid Mehmood	14:40 - Slot removed 15:00	14:40 Virtual Initial 15:00	05:40 - Stot mmoved 10:80	89:40 - Virtual Initial 18:80	14:38 Virtual Initial 14:58	09:40 - Slot removed 10:00	89:40 - Virtual Initial 18:00	89:48 - Virtual Initial 18:88	10:00 - Virtual 10:20
Piotr Stefanski Mattia Venuti	15:00	15:00	19:89	18:00	14:50	10:00	18:00	18:00	10:40
	- Slot removed	- Virtual Initial	- Slot smoved	- Virtual IniBal	- Virtual Initial	- Slot removed	- Virtual Initial	- Virtual Initial	- Virtual
	15:20	15:20	19:29	18:20	15:10	10:20	18:20	18:28	11:30
V Rota type (75)	15:40	15:40	10:40	18:40	15:30	10:40	18:40	18:48	11:00
	- Slot removed	- Virtual Initial	- Virteal Initial	- Virtual Initial	- Virtual Initial	- Slot removed	- Virtual Initial	- Virtual Initial	- Virtual
	16:00	16:60	11:80	11:88	15:58	11:00	11:00	11:88	11:20
APP F2F APP Tel APP 1el	16:00	18:00	11:00	11:00	15:50	11:00	11:00	11:00	11:20
	- Slot removed	Virtual Initial	- Virtual Initial	- Virtual Initial	- Virtual Ini Bal	- Slot removed	- Virtual Initial	- Virtual Initial	- Virtual
	16:20	18:20	11:20	11:20	16:18	11:20	11:20	11:20	11:40
Apply filters	16:20	18:28	11:20	11:28	18:39	11:20	11:20	11:28	12:30
	- Slot removed	- Virtual Initial	- Virtsol IniSol	- Virtual Initial	- Virtual Ini Sal	- Slot removed	Virtual Initial	- Virtual Initial	- Mona
	16:40	18:48	11:40	11:48	18:59	11:40	11:40	11:48	12:50
	17:00	17:00	12:30	12:00	16:50	12:25	12:30	12:30	12:59
	- Slot removed	- Virtual Initial	Lacy William	- Virtual Initial	- Virtual Ini Bal	- Slot removed	Virtual Initial	- Virtual Initial	- Virtual
	17:20	17:20	12:50	12:20	17:58	12:45	12:50	12:50	12:10

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.



10m/10 -: (0) -:	0 0								
Clinician	•	Clir	nics						
Search for a Clinician		12 th	May 2025 - 12th May 2025						
Farah Anverkhan		<u> </u>							
Byju Binoy		Mor	nday, 12th May 2025	Mor	day, 12th May 2025	Mon	day, 12th May 2025	Mon	day, 12th May 202
Mohammad Khan		- F	- Anverkhan		B Binoy		M Khan	B Kubera	
Bartek Kubera		L	PhysioLine		PhysioLine		PhysioLine		PhysioLine
Rota type	0		Virtual Appt		Virtual Appt		Virtual Appt		Virtual Appt
APP F2F		13:00	Slot removed	10:00	Slot removed	13:00			
APP Tel		13:20		10:20					
APP Vid		13:20	Slot mmoved						
APP Virtual		13:40						08:40	
HCA Tel		13:40					Actions		×
HT F2F		14:00	Slotremoved				Cancel celect	od cloto	tual Initial
HT Tel		14:20					Cancerseieer	50 31013	
MSK Rehab		- 14:40	Slot removed						
Slot type	0	14:40							
	_	-	Slot removed						
Face to Face In		15-00							
Follow Up		-	Slot removed						
Sheekwaya Felle		15:20							
Telephone Felle		15:40	Slot removed						
Telephone Initi		16:00							
Vir Follow Un		16:00	Slotremoved						
Virtual Initial		16:20							
	_	16:20							
Apply filters		16:40	Slot 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 <u>RIVIAM.com/Helpcentre</u> 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:

- 1. **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.
- 3. **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.

11.3.2 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 <u>support@riviam.zendesk.com</u>.