



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: <ol style="list-style-type: none"> 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 last-minute 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.**

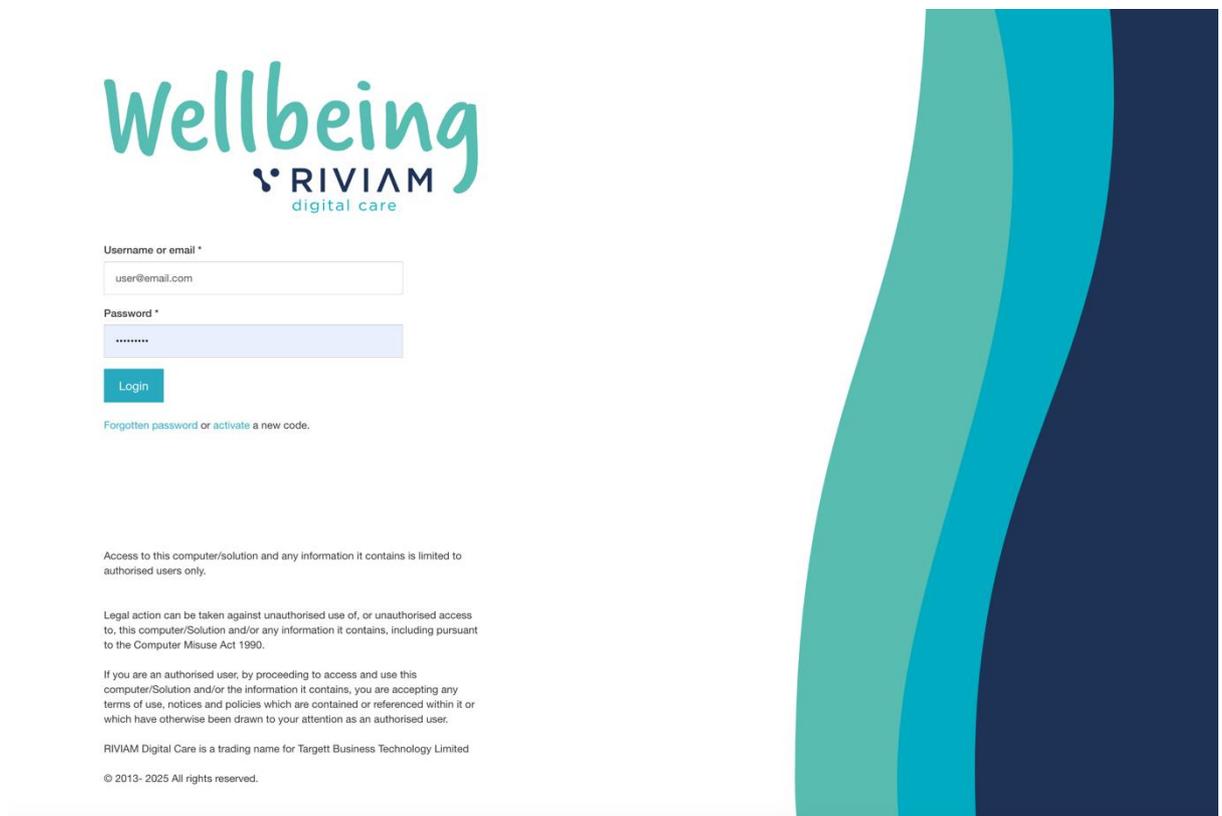


Figure 1: Login screen.

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](#)).

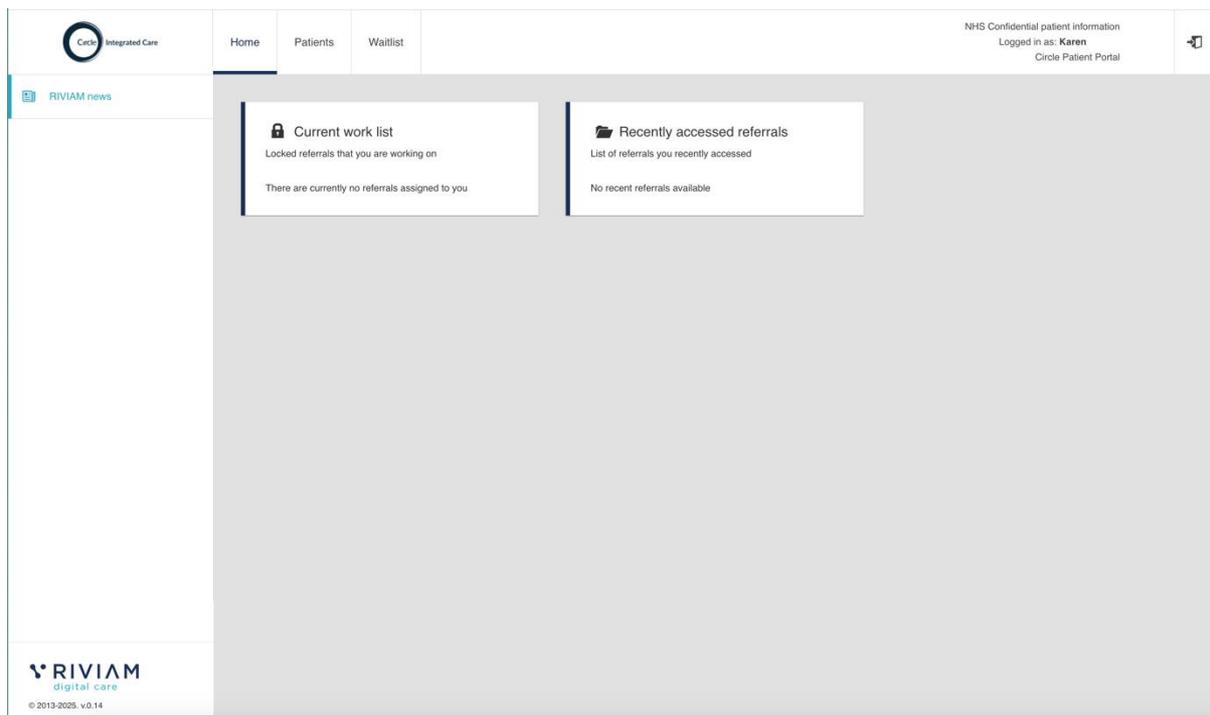


Figure 2: Homepage.

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.

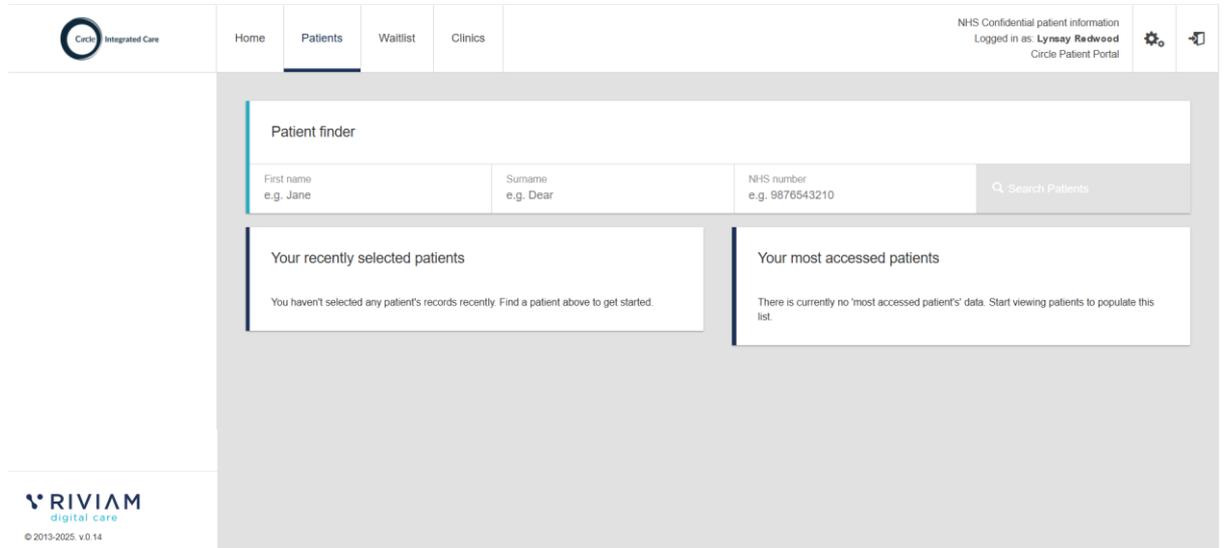


Figure 3: Patient tab initial view.

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**.

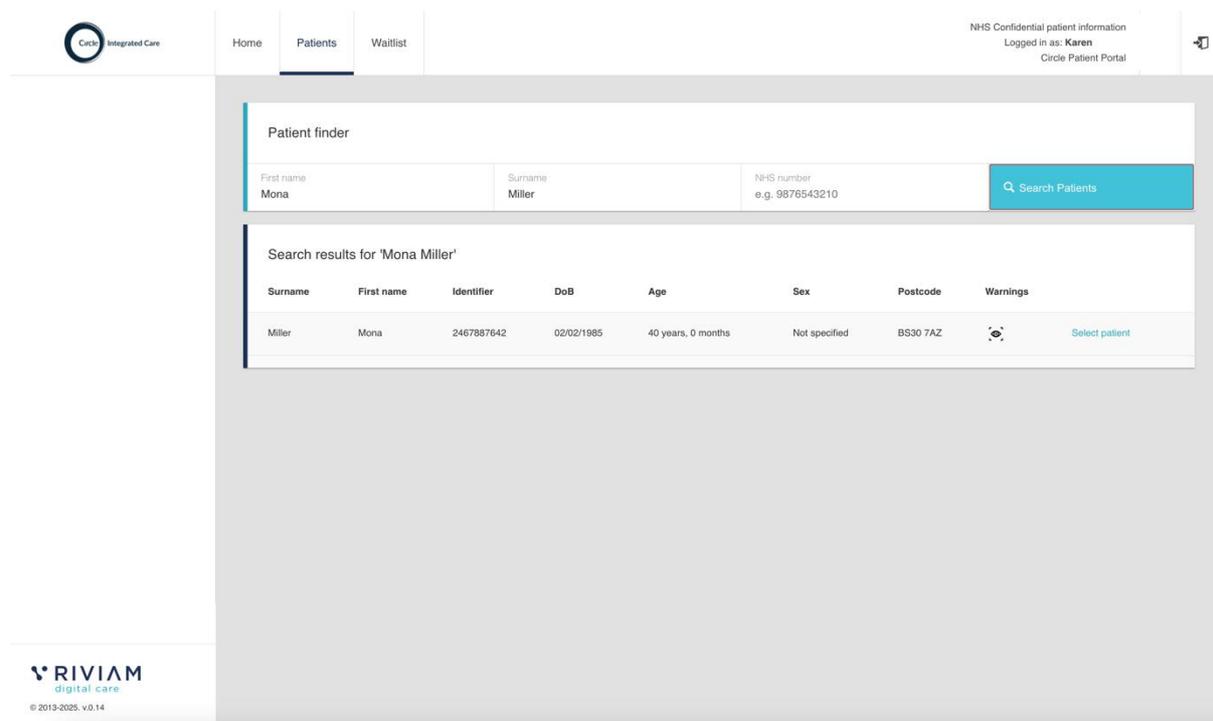
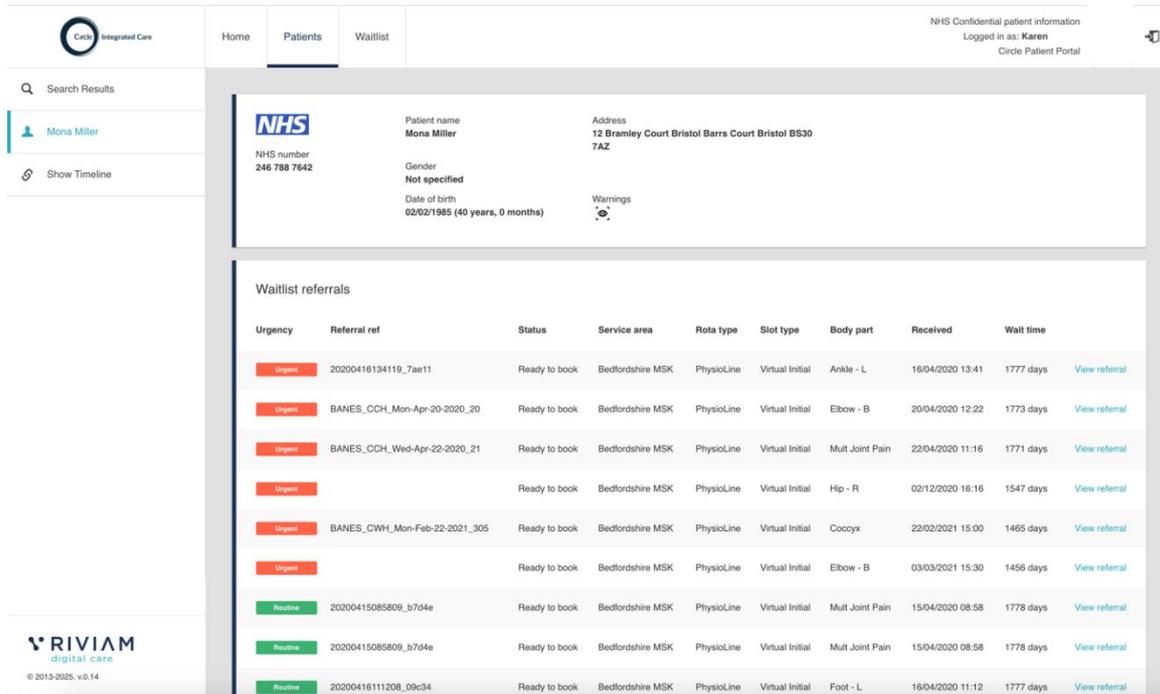


Figure 4: Patient search.

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.



The screenshot shows the RIVIAM digital care patient single-view interface. The top navigation bar includes 'Home', 'Patients', and 'Waitlist'. The patient details section displays the NHS logo, patient name 'Mona Miller', NHS number '246 788 7642', gender 'Not specified', date of birth '02/02/1985 (40 years, 0 months)', address '12 Bramley Court Bristol Barrs Court Bristol BS30 7AZ', and a warning icon. Below this is a table of waitlist referrals with the following columns: Urgency, Referral ref, Status, Service area, Rota type, Slot type, Body part, Received, and Wait time. The table contains 10 rows of data, with the first six rows marked as 'Urgent' and the last four as 'Routine'. Each row includes a 'View referral' link.

Urgency	Referral ref	Status	Service area	Rota type	Slot type	Body part	Received	Wait time
Urgent	20200416134119_7ae11	Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Ankle - L	16/04/2020 13:41	1777 days View referral
Urgent	BANES_CCH_Mon-Apr-20-2020_20	Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Elbow - B	20/04/2020 12:22	1773 days View referral
Urgent	BANES_CCH_Wed-Apr-22-2020_21	Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Mult Joint Pain	22/04/2020 11:16	1771 days View referral
Urgent		Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Hip - R	02/12/2020 16:16	1547 days View referral
Urgent	BANES_CWH_Mon-Feb-22-2021_305	Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Coccyx	22/02/2021 15:00	1465 days View referral
Urgent		Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Elbow - B	03/03/2021 15:30	1456 days View referral
Routine	20200415085809_b7d4e	Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Mult Joint Pain	15/04/2020 08:58	1778 days View referral
Routine	20200415085809_b7d4e	Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Mult Joint Pain	15/04/2020 08:58	1778 days View referral
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:

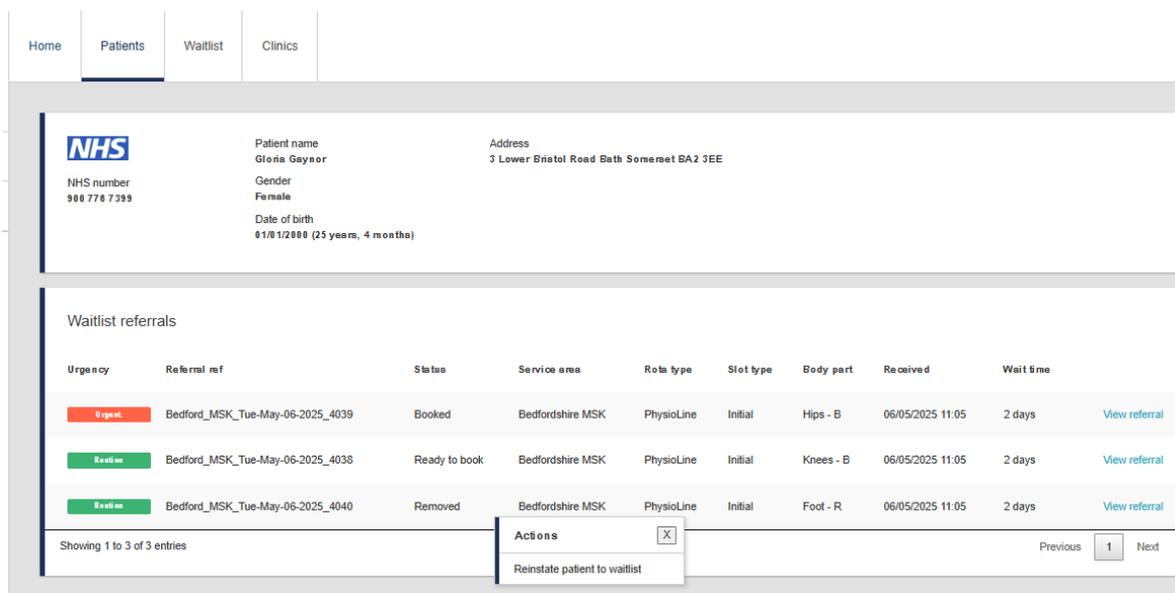
- Book an appointment.
- Cancel an appointment.
- Send an invitation to the patient to book an appointment.
- Remove a patient from the waitlist.
- Reinstate a referral to the waitlist.

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'.



Urgency	Referral ref	Status	Service area	Rota type	Slot type	Body part	Received	Wait time	
Urgent	Bedford_MSK_Tue-May-06-2025_4039	Booked	Bedfordshire MSK	PhysioLine	Initial	Hips - B	06/05/2025 11:05	2 days	View referral
Routine	Bedford_MSK_Tue-May-06-2025_4038	Ready to book	Bedfordshire MSK	PhysioLine	Initial	Knees - B	06/05/2025 11:05	2 days	View referral
Routine	Bedford_MSK_Tue-May-06-2025_4040	Removed	Bedfordshire MSK	PhysioLine	Initial	Foot - R	06/05/2025 11:05	2 days	View referral

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.

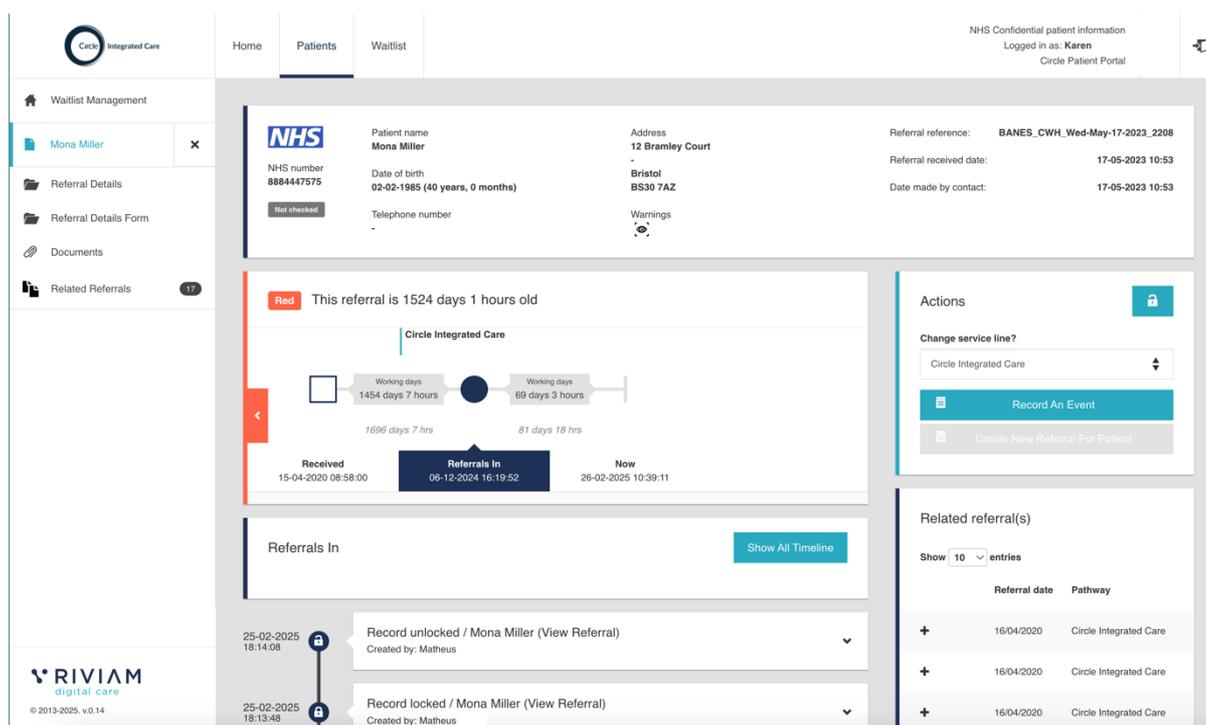


Figure 7: Referral page navigator.

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.

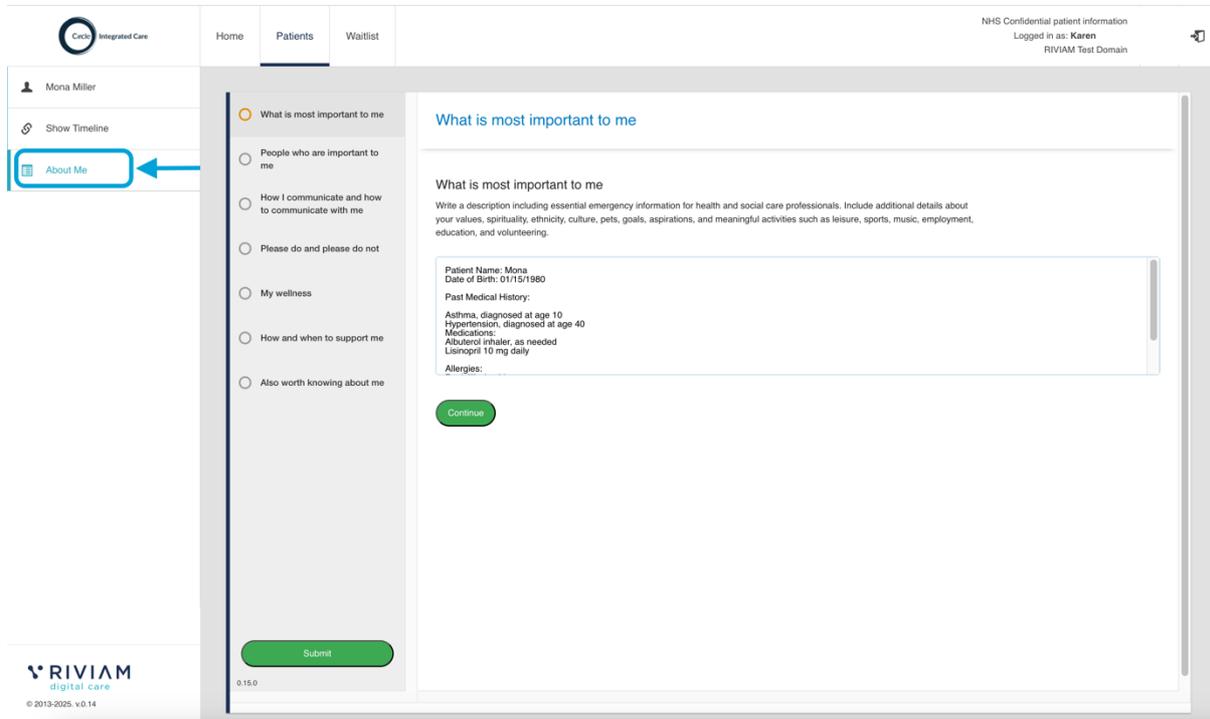


Figure 8: About me.

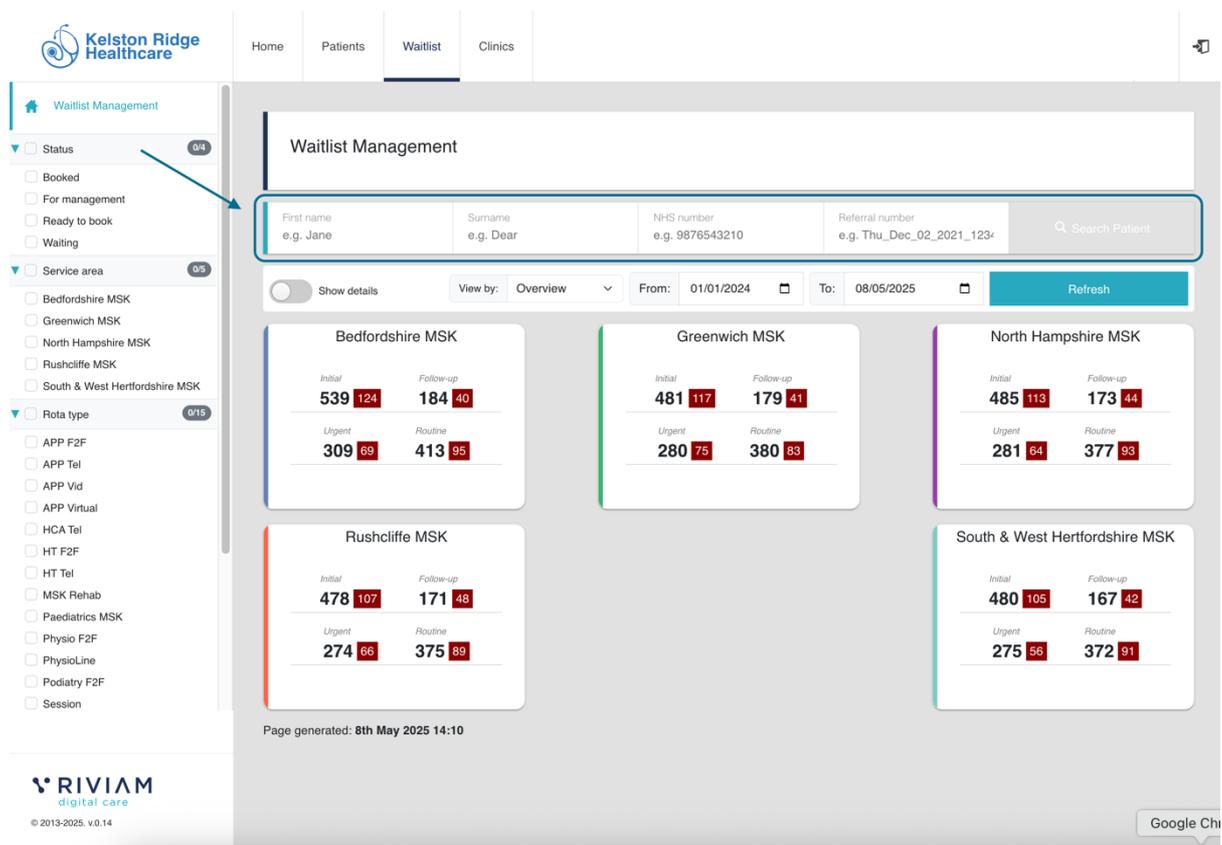
	<p>Note: Future functionality will include integrating the About Me fields into the clinical system. This is currently not in scope.</p>
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7 Waitlist page

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.



The screenshot shows the 'Waitlist Management' page for Kelston Ridge Healthcare. The interface includes a navigation menu on the left with filters for Status (0/4), Service area (0/3), and Rota type (0/15). The main area features a search bar with fields for First name (e.g. Jane), Surname (e.g. Dear), NHS number (e.g. 9876543210), and Referral number (e.g. Thu_Dec_02_2021_123). Below the search bar are options to 'Show details', 'View by: Overview', and date filters for 'From: 01/01/2024' and 'To: 08/05/2025'. The main content displays five service area dashboards, each showing counts for Initial, Follow-up, Urgent, and Routine referrals.

Service Area	Initial	Follow-up	Urgent	Routine
Bedfordshire MSK	539	184	309	413
Greenwich MSK	481	179	280	380
North Hampshire MSK	485	173	281	377
Rushcliffe MSK	478	171	274	375
South & West Hertfordshire MSK	480	167	275	372

Page generated: 8th May 2025 14:10

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

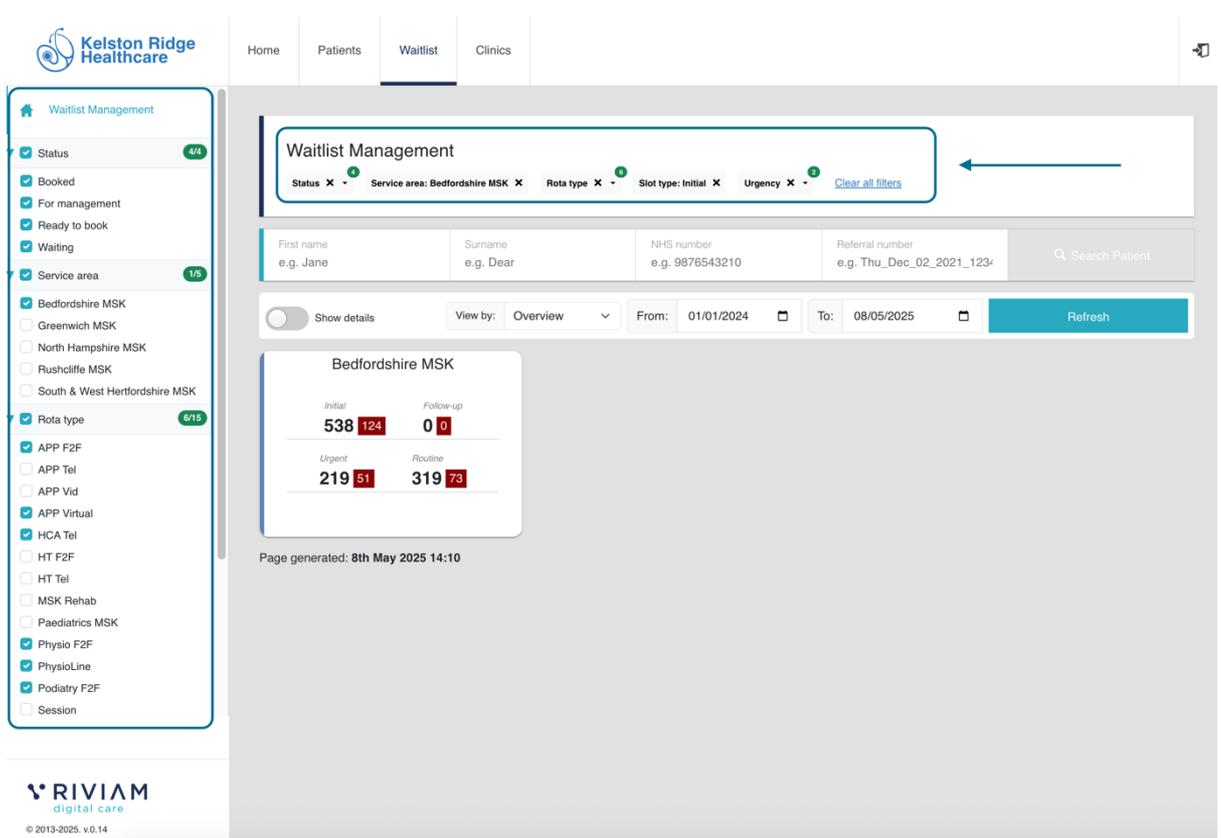


Figure 10: Using and viewing filters.

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**.

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

The Waitlist page offers three dashboard views.

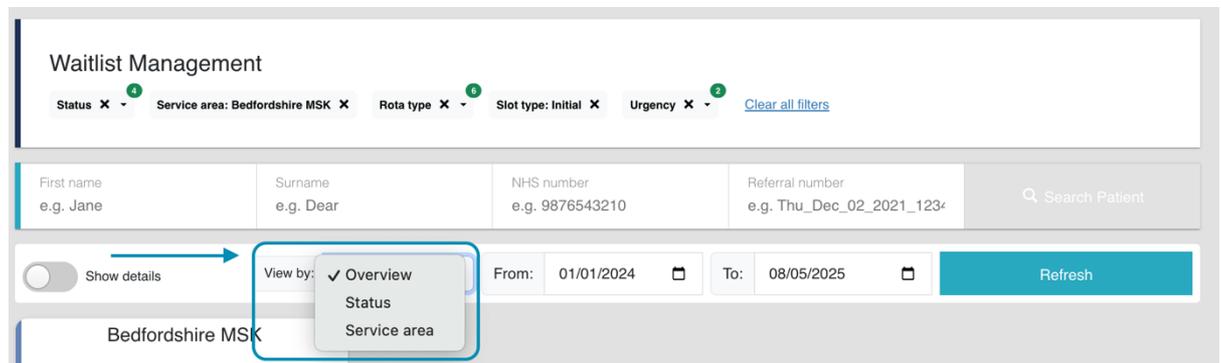


Figure 11: Dashboard options 'View by'.

- 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).

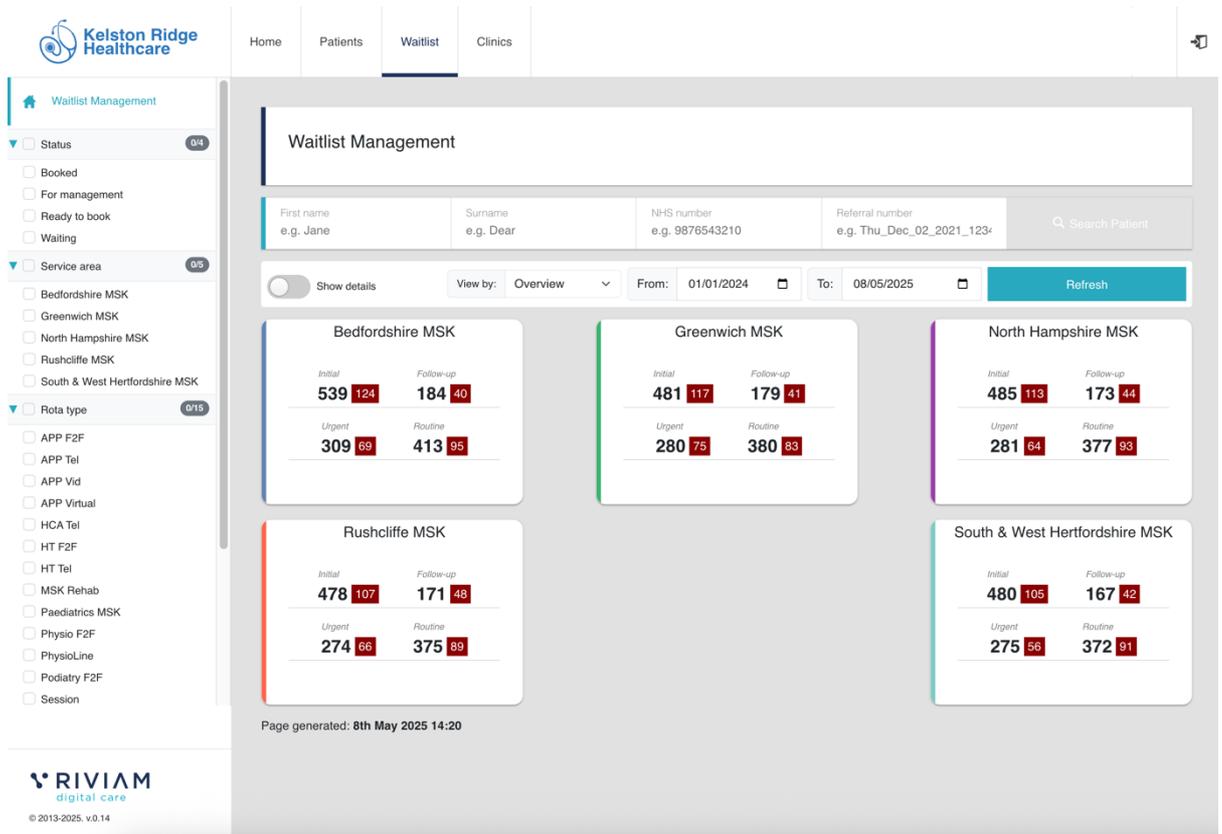


Figure 12: Overview dashboard.

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:

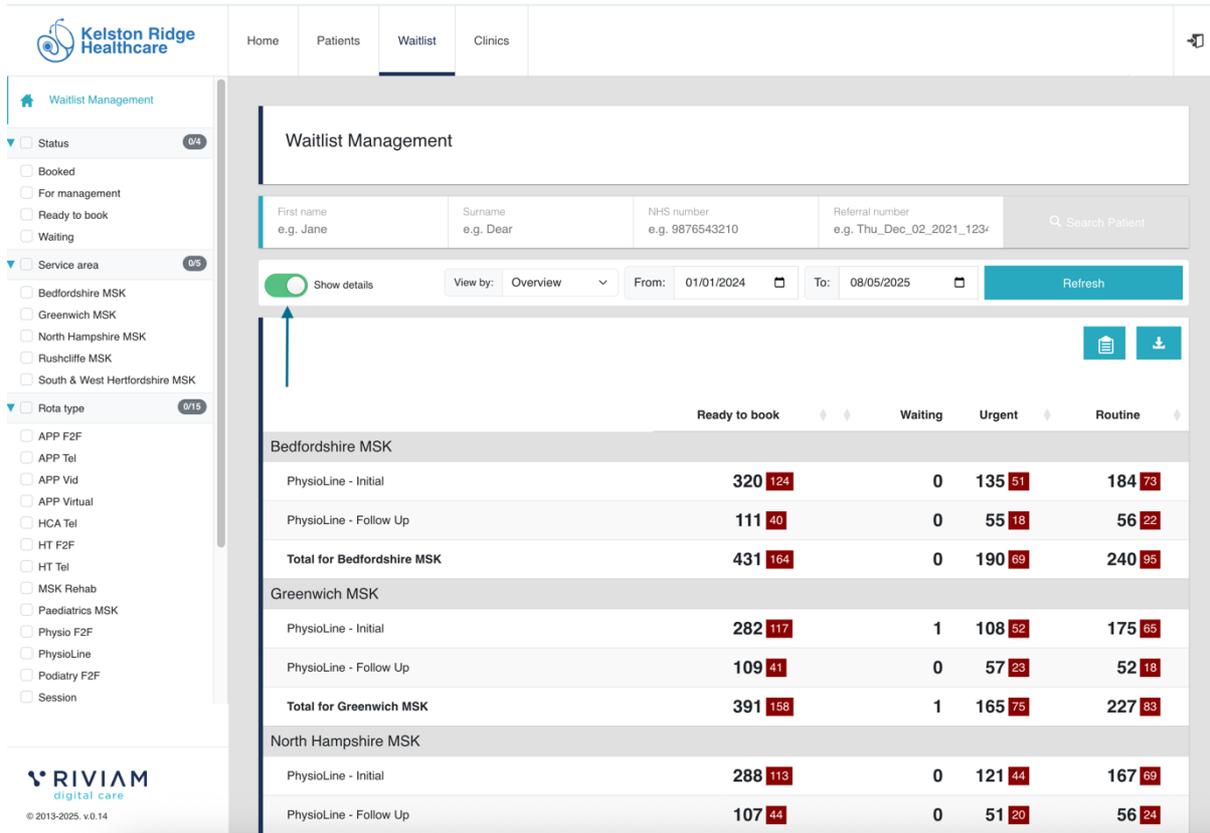


Figure 13: Overview dashboard show details.

- 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.

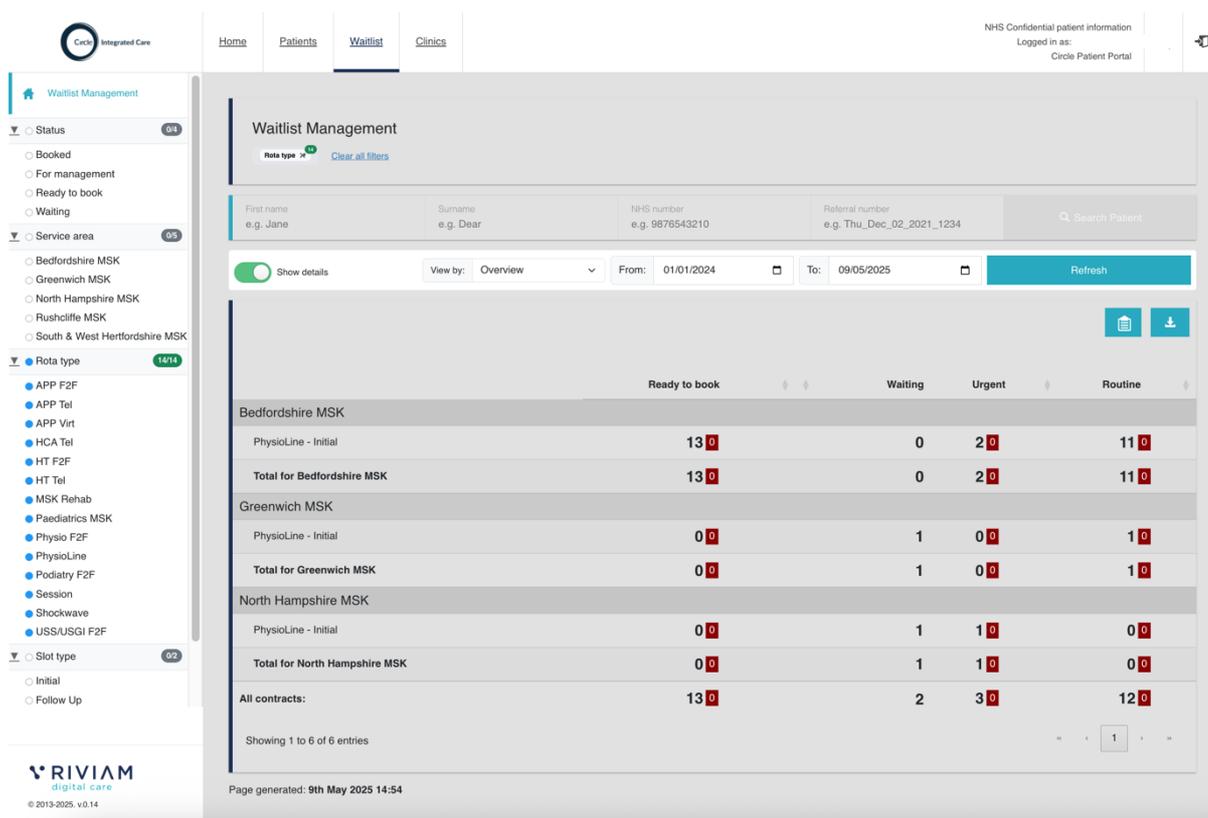


Figure 14: List of referrals by rota type.

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.

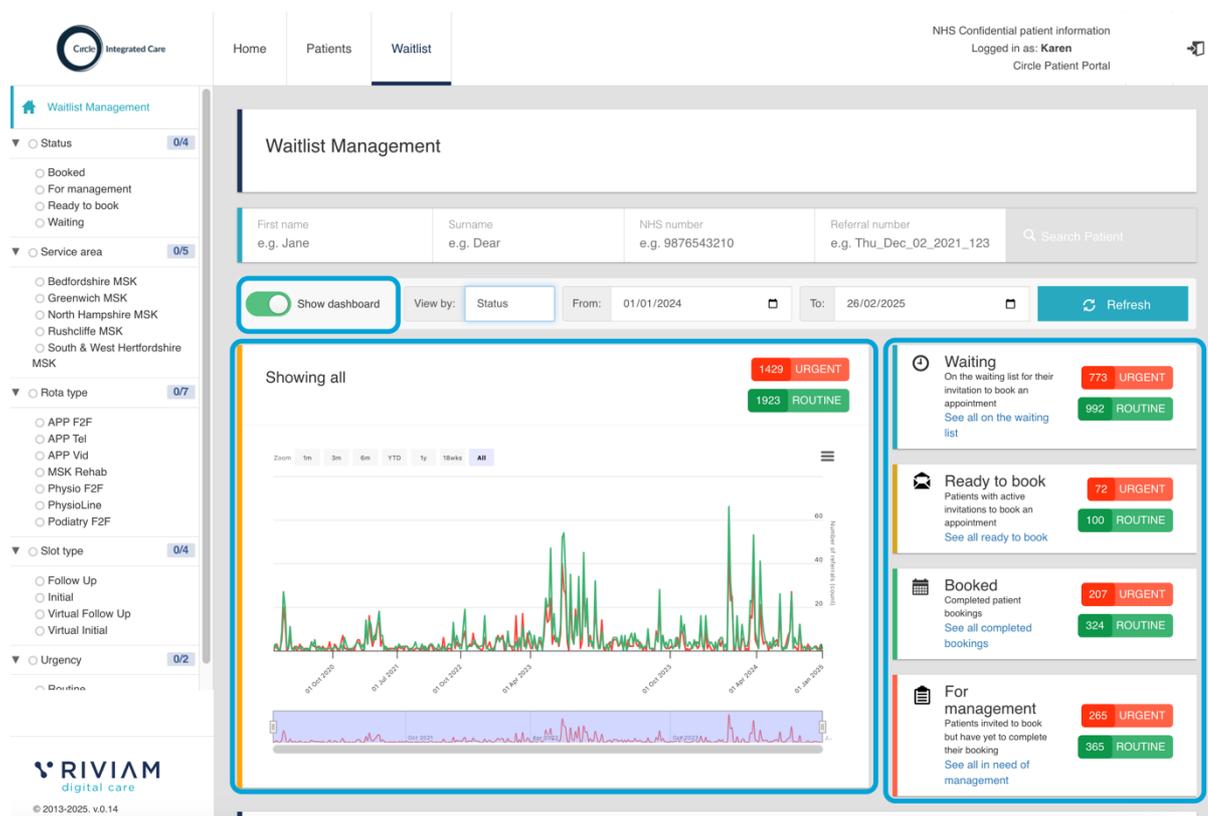


Figure 15: View Waitlist status dashboard.

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.

Urgency	Patient name	NHS number	Referral ref	Status	Service area	Rota type	Slot type	Body part	Received	Wait time	
Urgent	Greta Echeverria		20200416091331_cc3e4	For management	Greenwich MSK	APP Tel	Initial	Hips - B	16/04/2020 09:13	1777 days	View referral
Urgent	Mona Miller	2467887642	20200416134119_7ae11	Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Ankle - L	16/04/2020 13:41	1777 days	View referral
Urgent	Priya Brown		20200417141412_b8ae9	Booked	South & West Hertfordshire MSK	APP Tel	Initial	Foot - R	17/04/2020 14:14	1776 days	View referral
Urgent	Ines Clark	1234123423	20200417170325_4f9fe		Rushcliffe MSK	APP Vid	Initial	Ankle - L	17/04/2020 17:03	1776 days	View referral
Urgent	Pavel Brown	1234567243			Bedfordshire MSK	MSK Rehab	Initial	Thoracic spine	17/04/2020 18:29	1776 days	View referral
Urgent	Mona Miller	2467887642	BANES_CCH_Mon-Apr-20-2020_20	Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Elbow - B	20/04/2020 12:22	1773 days	View referral
Urgent	Mona Miller	2467887642	BANES_CCH_Wed-Apr-22-2020_21	Ready to book	Bedfordshire MSK	PhysioLine	Virtual Initial	Mult Joint Pain	22/04/2020 11:56	1771 days	View referral

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:** 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.

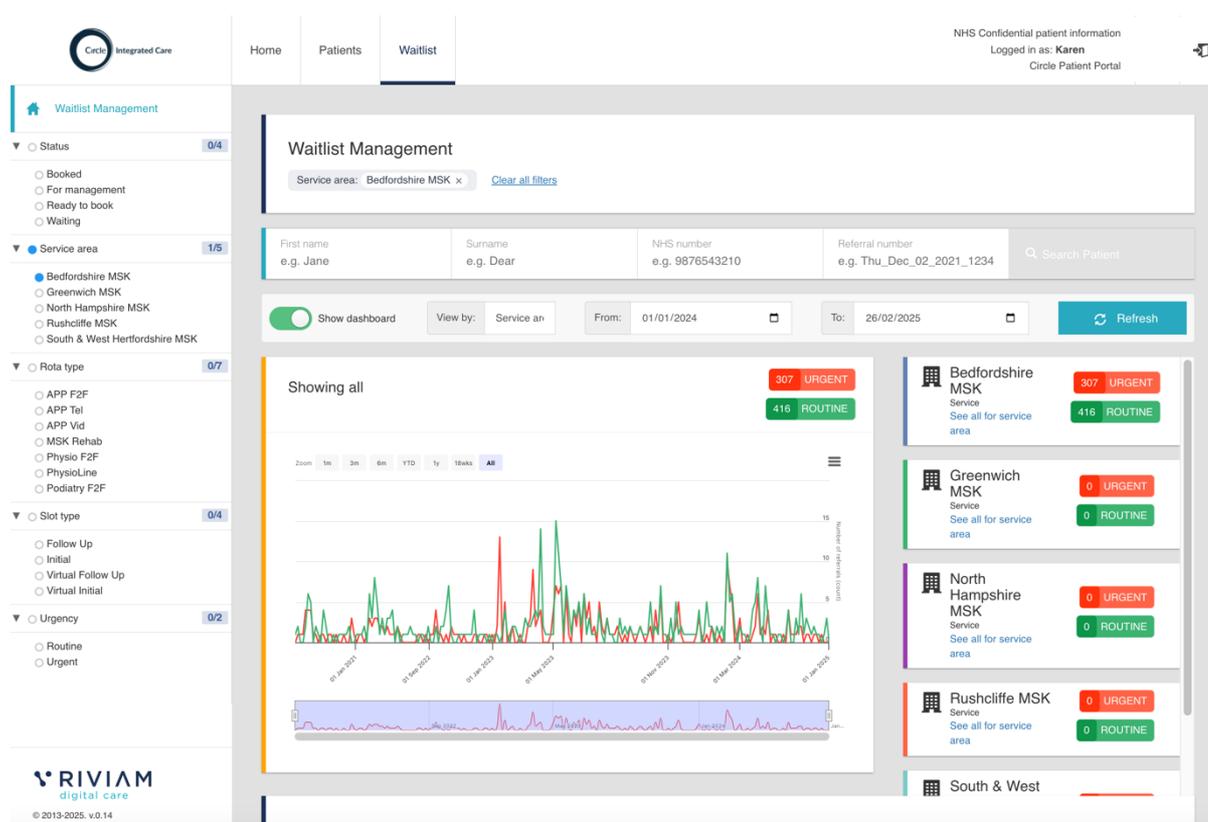


Figure 17: View the Service area dashboard.

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).

Waitlist Management

Status: For management 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

Showing all: 265 URGENT, 365 ROUTINE

Urgency	Patient name	NHS number	Referral ref	Status	Service area	Rota type	Slot type	Body part	Received	Wait time
Urgent	Greta Echeverria	20200416091331_cc3e4		For management	Greenwich MSK	APP Tel	Initial	Hips - B	16/04/2020 09:13	1777 days View referral
Urgent	Charlie Roberts	BANES_CCH_Thu-Apr-23-2020_36		For management	Greenwich MSK	Physio F2F	Initial	Sacroiliac	23/04/2020 10:26	1770 days View referral
Urgent	Bob Ivanov	BANES_CCH_Thu-Apr-23-2020_39		For management	Greenwich MSK	APP F2F	Initial	Coccyx	23/04/2020 12:41	1770 days View referral
Urgent	George Johnson	BANES_CCH_Thu-Apr-23-2020_51		For management	Bedfordshire MSK	APP F2F	Initial	Elbow - L	23/04/2020 14:28	1770 days View referral
Urgent	Bastian Brown	1231231231 BANES_CCH_Thu-Apr-23-2020_54		For management	Rushcliffe MSK	Physio F2F	Initial	Elbow - B	23/04/2020 16:41	1770 days View referral

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.

Waitlist Management

First name: e.g. Jane Surname: e.g. Dear NHS number: e.g. 9876543210 Referral number: e.g. Thu_Dec_02_2021_1234

From: 01/01/2024 To: 14/02/2025 Refresh

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:

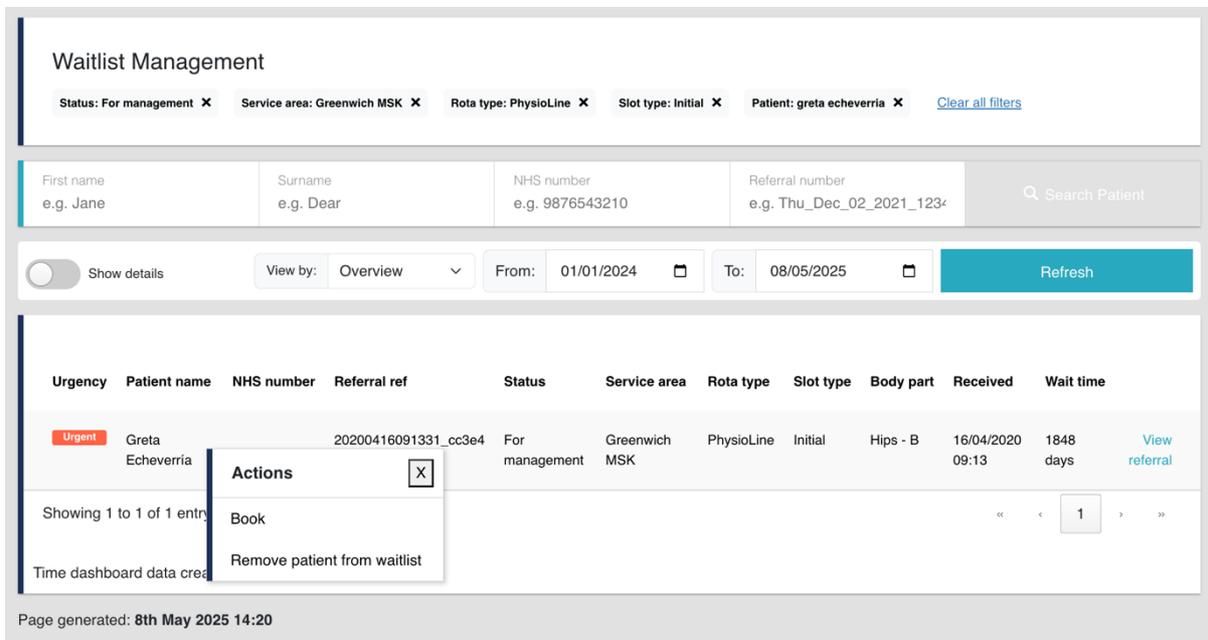


Figure 20: Right-click actions. In this example: Book or Remove patient from waitlist.

A pop-up window will appear as shown below:

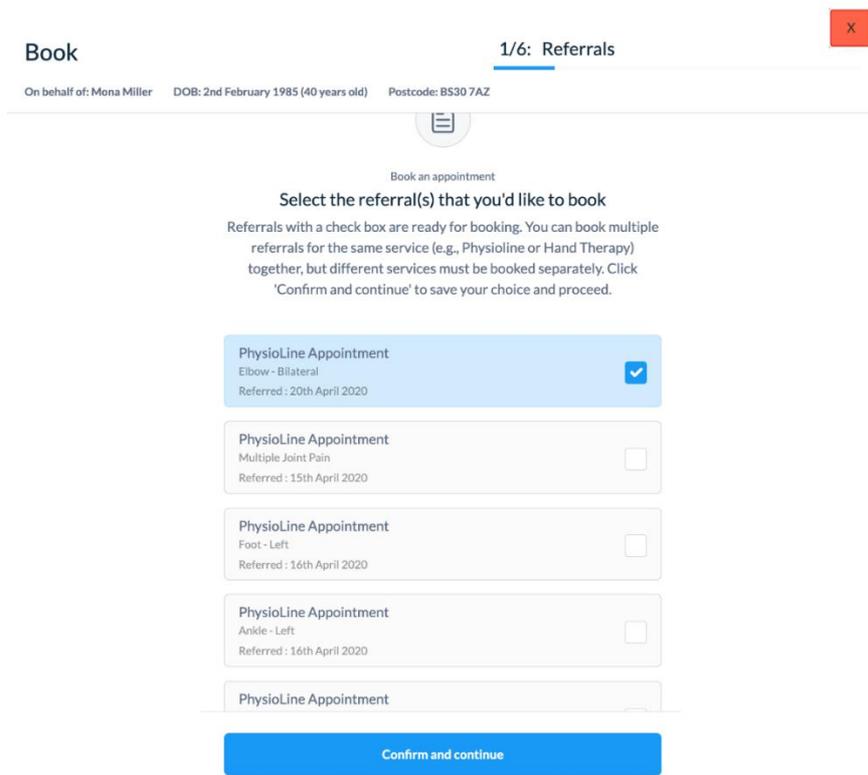


Figure 21: Choose the referral to book an appointment.

Select the location of the appointment as appropriate.

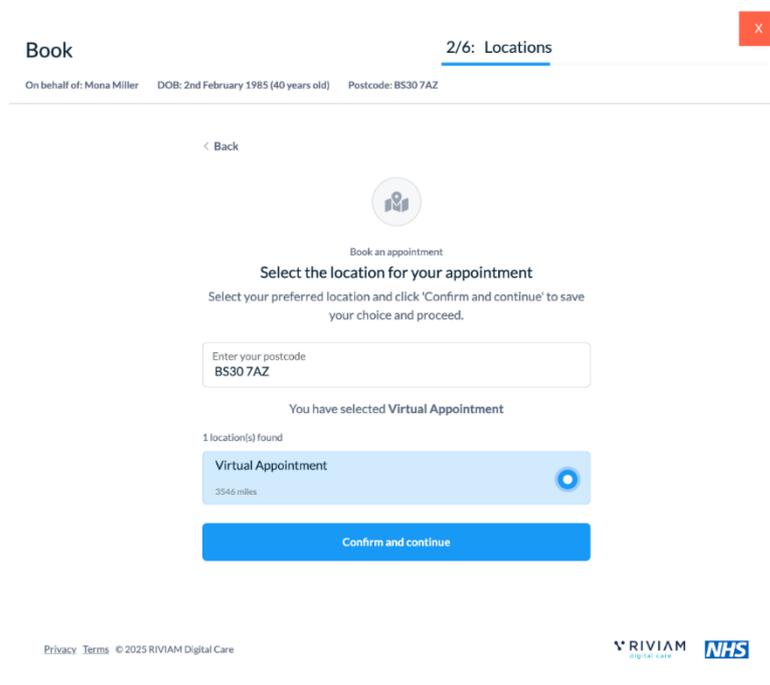


Figure 22: Select the location of the appointment.

Choose the date and timeslot of the appointment.

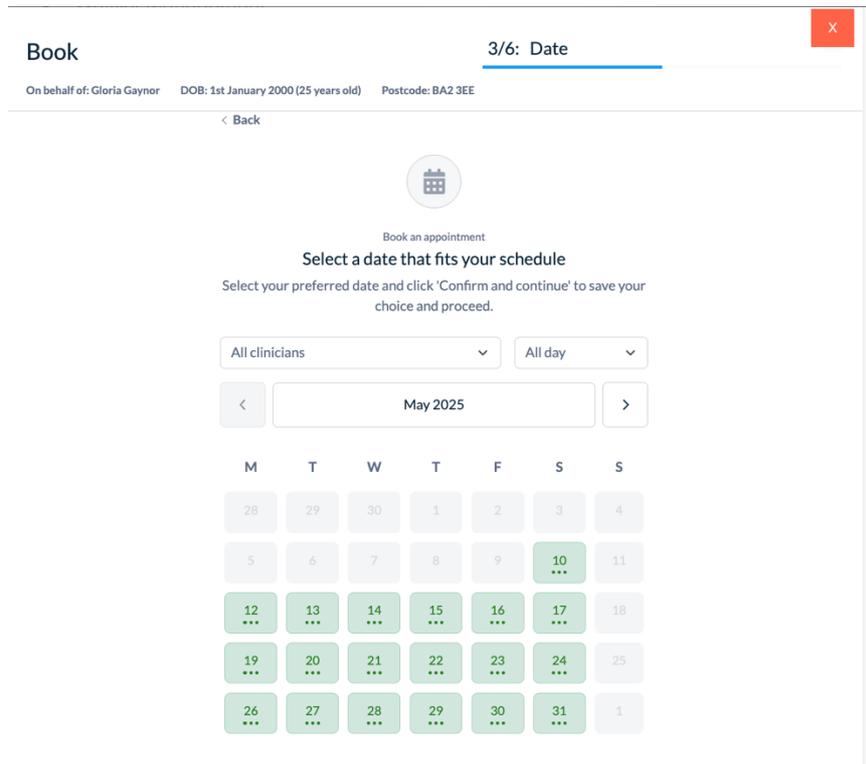


Figure 23: Select date.

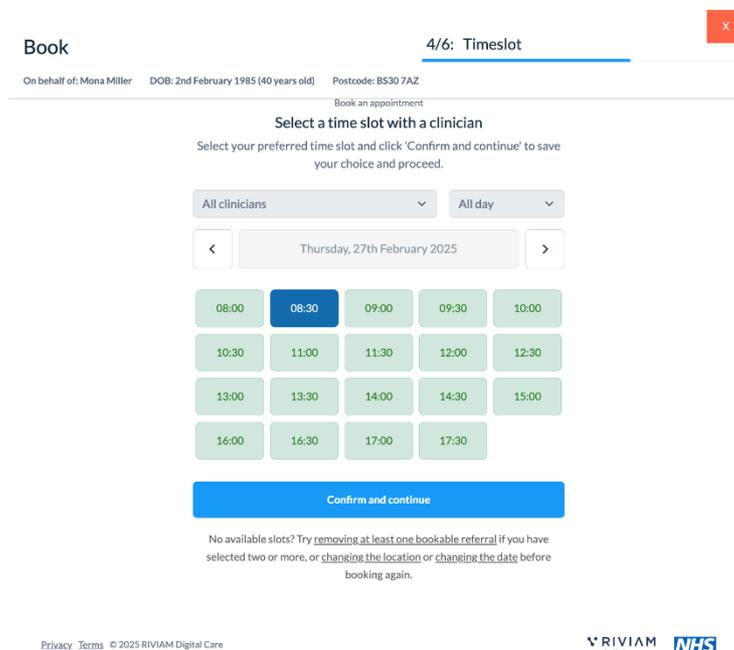


Figure 24: Choose the date and timeslot of the appointment.

Select a clinician for the patient to see.

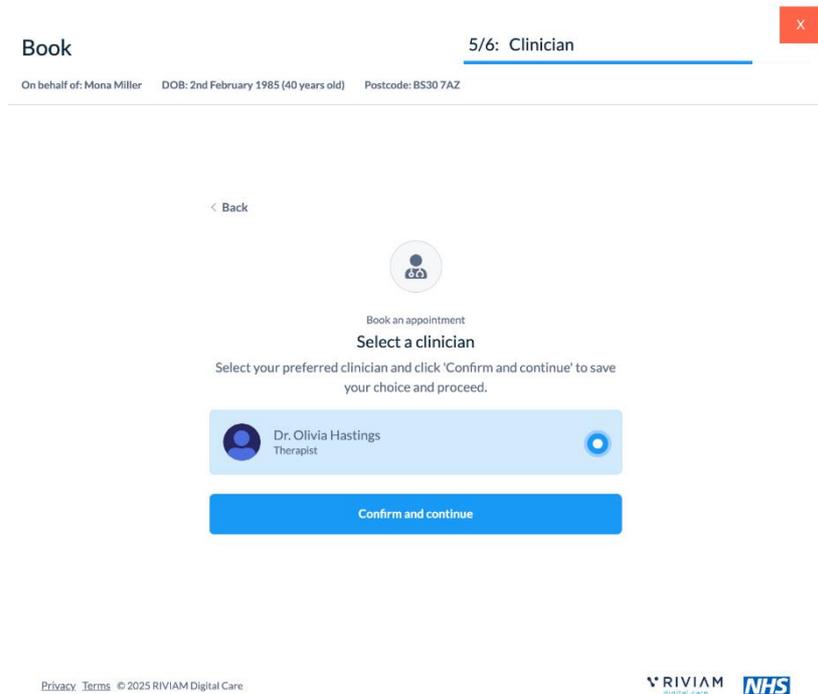


Figure 25: Select a clinician.

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.

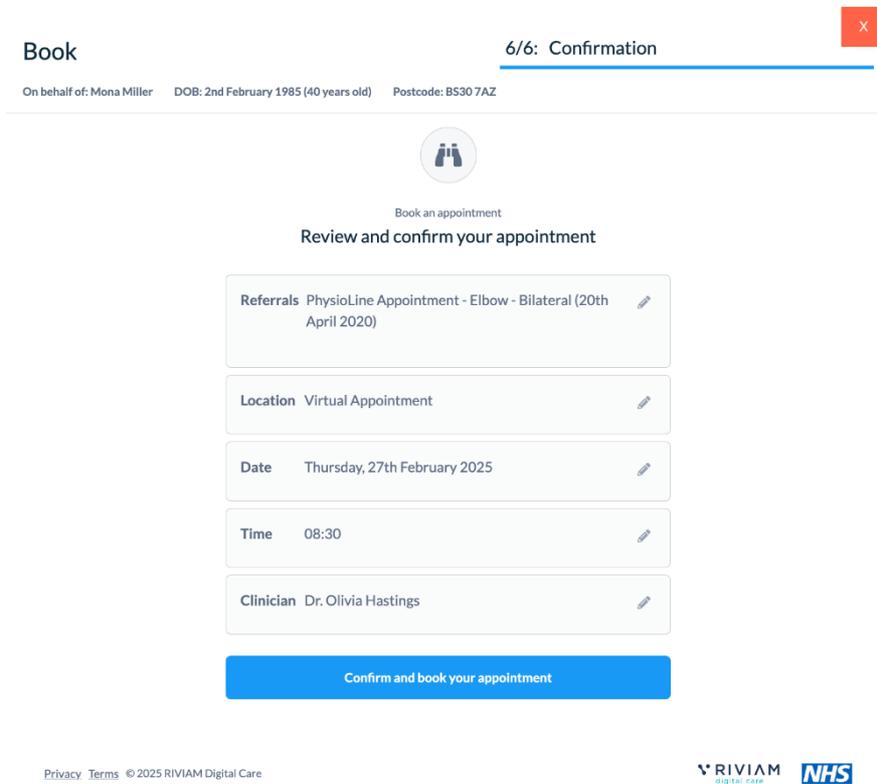


Figure 26: Review the selection and confirm.

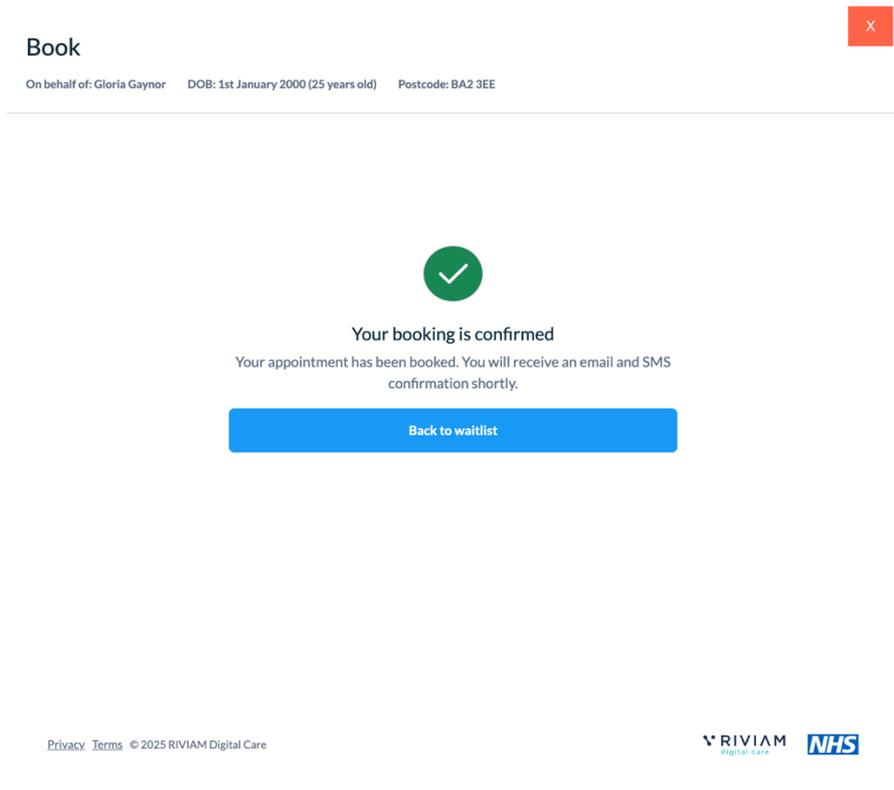


Figure 27: Booking confirmation.

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.

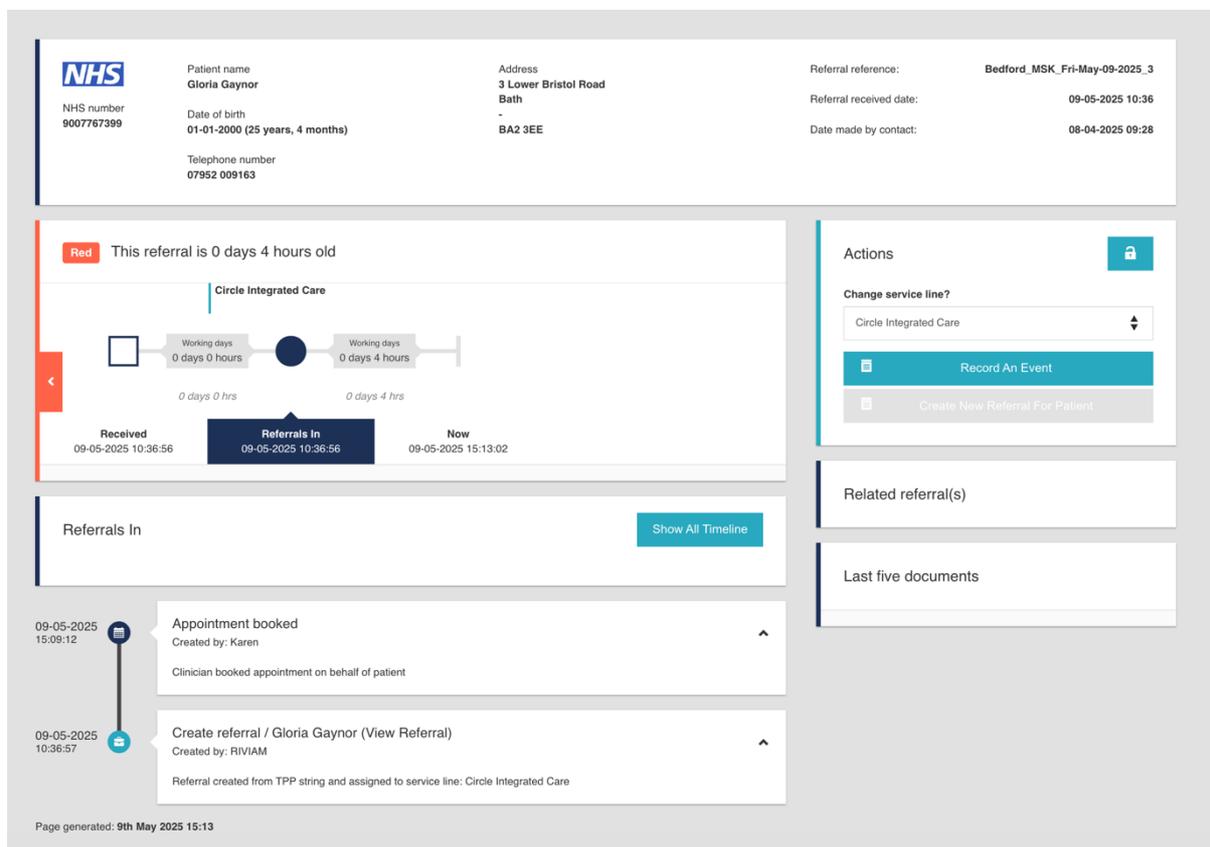


Figure 28: Timeline event created in the referral.

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 referral reference number.

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

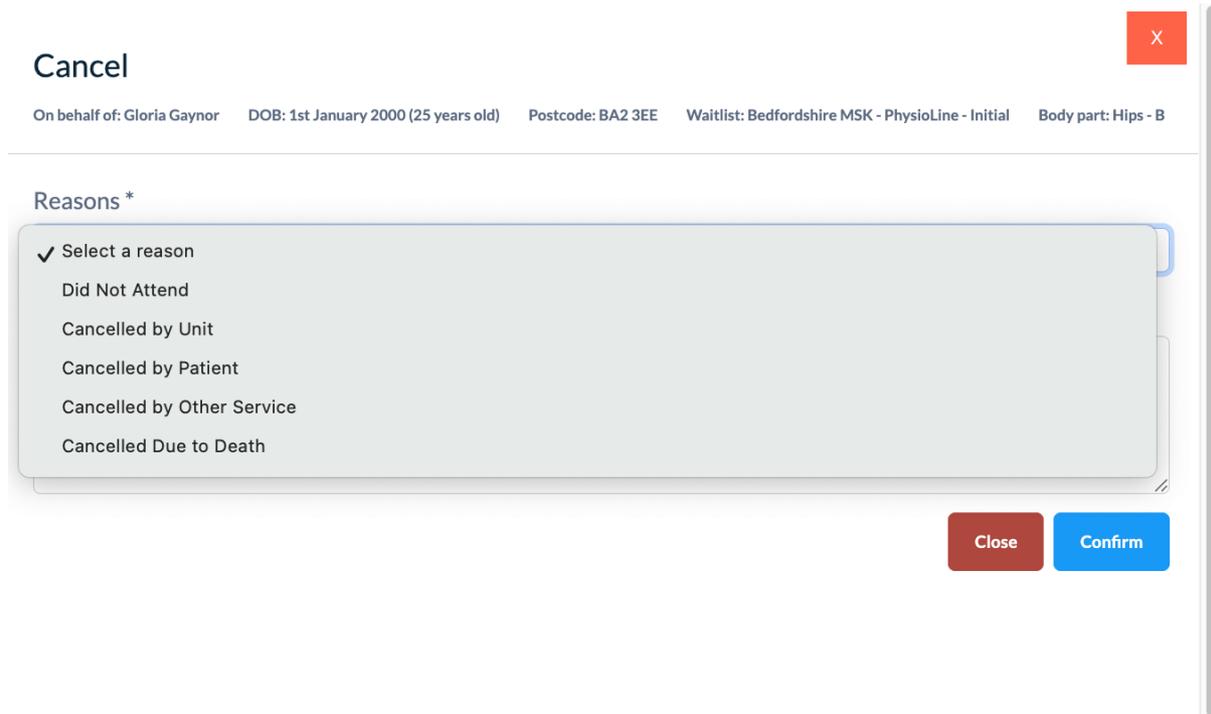
The screenshot shows the 'Waitlist Management' interface. At the top, there's a filter for 'Status: Booked' and a 'Clear all filters' link. Below this are search fields for 'First name' (e.g. Jane), 'Surname' (e.g. Dear), 'NHS number' (e.g. 9876543210), and 'Referral number' (e.g. Thu_Dec_02_). There are also controls for 'Show details' (a toggle), 'View by: Overview', and date ranges 'From: 01/01/2024' and 'To: 26/02/2025'. The main part of the interface is a table with columns: Urgency, Patient name, NHS number, Referral ref, Status, Service area, Rota type, and Slot type. Two rows are visible: one for 'Mona Miller' (Urgent, Booked, Bedfordshire MSK, Phvsiol ine, Virtual Initial) and one for 'Priya Brown' (Urgent, Booked, South MSK, Initial). An 'Actions' menu is open over the 'Booked' status of the Priya Brown row, showing 'Cancel' and 'X' options.

Figure 29: Cancel an appointment..

Another pop-up window will appear.

The screenshot shows a 'Cancel' pop-up window. At the top right is a red 'X' close button. Below the title, there's patient information: 'On behalf of: Gloria Gaynor', 'DOB: 1st January 2000 (25 years old)', 'Postcode: BA2 3EE', 'Waitlist: Bedfordshire MSK - PhysioLine - Initial', and 'Body part: Hips - B'. The main section is titled 'Reasons *' and contains a dropdown menu with 'Select a reason'. Below that is a 'Note *' section with a text area containing the message 'An accompanying note is required'. At the bottom right, there are two buttons: a red 'Close' button and a blue 'Confirm' button.

Figure 30: Record a cancellation.



Cancel ✕

On behalf of: Gloria Gaynor DOB: 1st January 2000 (25 years old) Postcode: BA2 3EE Waitlist: Bedfordshire MSK - PhysioLine - Initial Body part: Hips - B

Reasons *

- ✓ Select a reason
- Did Not Attend
- Cancelled by Unit
- Cancelled by Patient
- Cancelled by Other Service
- Cancelled Due to Death

Close Confirm

Figure 31: Reasons for cancellation.

You will be asked to provide a reason for cancellation (these reasons are under review and aligned with SystemOne) 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'.

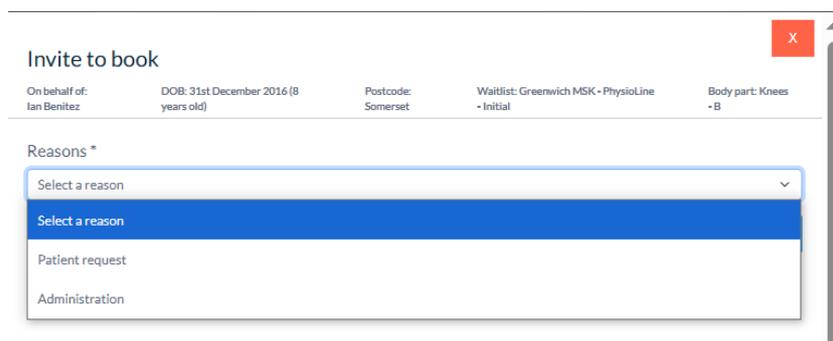


Figure 34: Reason for the invitation to book.

- 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.

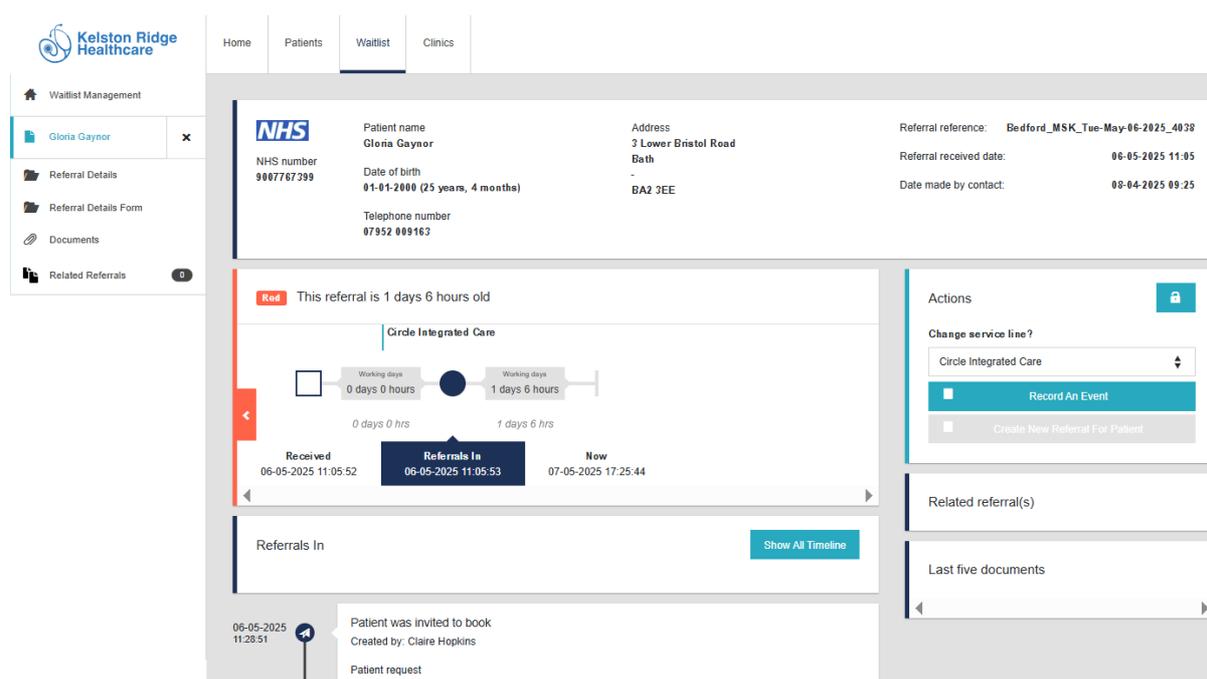


Figure 35: Invitation to book timeline event.

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.

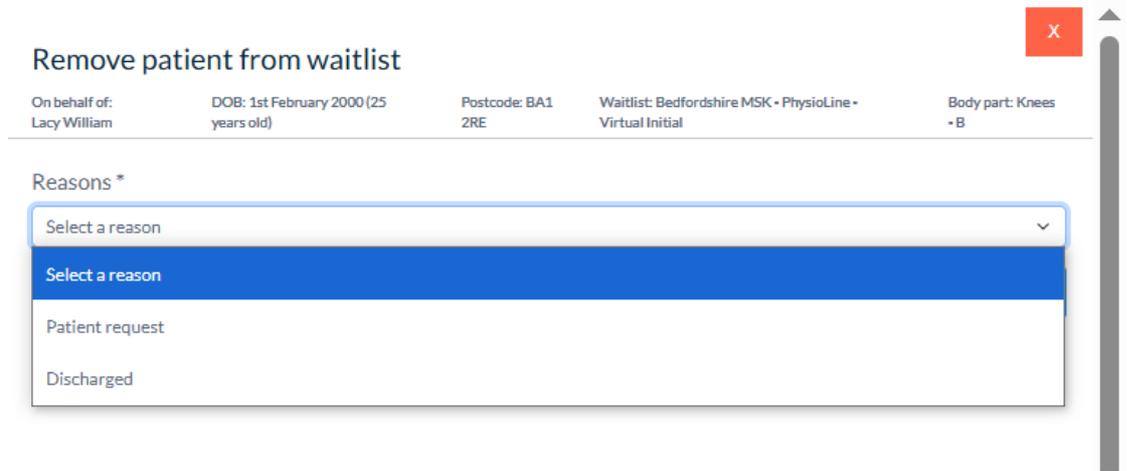


Figure 36: Remove patient from waitlist.

- 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.

	<p>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</p>
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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.

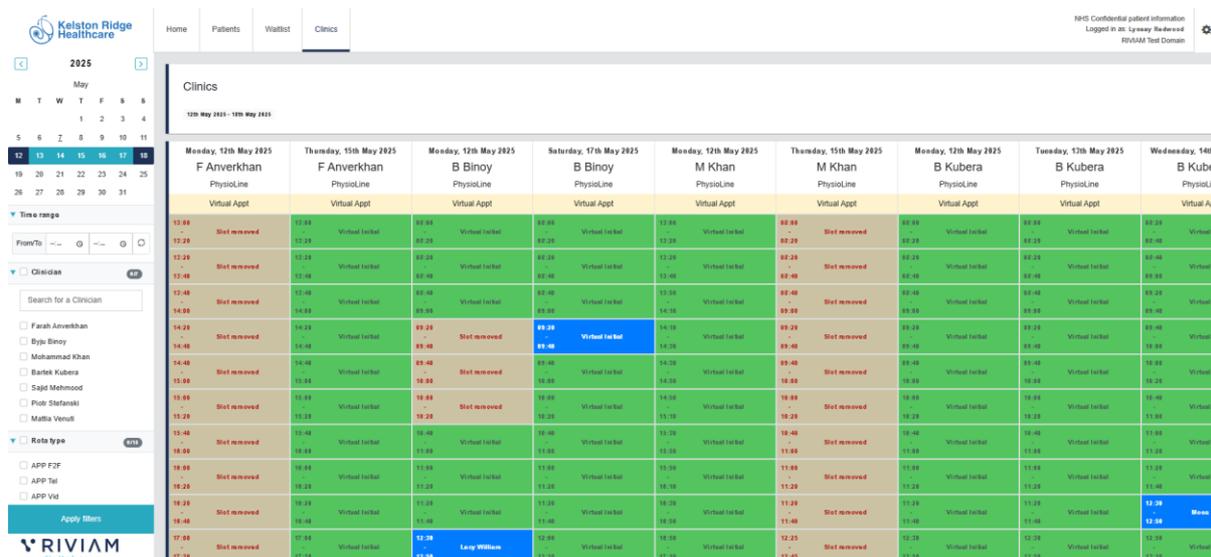


Figure 37: Clinic overview.

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.

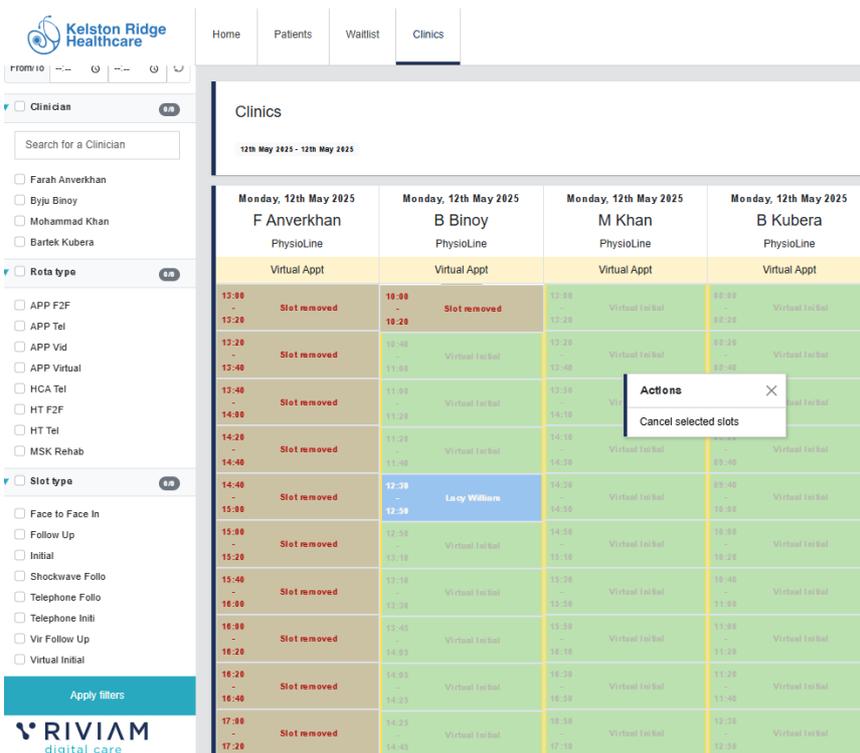


Figure 38: Cancel a clinic/ remove a clinic slot.

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:

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.
2. **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 support@riviam.zendesk.com.