Wait List - Overview

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CareRight has the ability to manage patients via the Wait List functionality. There are two scenarios that we will cover here.

- A patient wants to cancel an appointment and be added to a wait list for a future appointment (Status - Pending); and,

- A patient wants to keep an appointment, and if a better time becomes free then they want to change to that time slot (Status - Reschedule).

Note:

- Waiting time can be changed to display controlled via **Global settings** by **Waitlist Display Age** .
- Rooms - This will only display if you have Rooms setup in CareRight.

Associated Assessments

If your appointment types have an associated assessment, you can review the related information via the *form* control.

This allows you to perform fast triage assessments or similar light weight assessments, where the wait list is used to manage incoming (non admitted) patients.

Rooms

Where a patient is waiting, and then seen in a consulting room; it is possible to move the patient into a specific area for consultation.

This functionality must be enabled via Calendar Options.

Patients who have an appointment scheduled and who are also on the wait list

If a Patient's original appointment is attended (no reschedule occurs) then the wait list entry will automatically 'drop off' when the appointment status is set to a completed condition.

Review the Wait List Entries

View Waitlist from the Appointments screen

1. ### CR Dashboard.

2. Select **Appointments** from menu.
    a. The Appointments dashboard will display.
3. Select the **Wait list** button (top right hand side of the Appointment dashboard).
    a. The Wait list sub menu will open. It will show a list of patients on the wait list.
4. Select the relevant Patient, right click the wait list entry, the following options are available:
    a. **Edit** - this will edit the Wait List entry
    b. **Delete** - this will delete the Wait List entry
    c. **Cut** - this will move/reschedule the existing appointment if there is one

d. **Details** - this will display the details of the Wait List entry

e. **Go to Appointment** - this will take you to the booked appointment details

f. **Go to Patient** - this will take you to the patient record.

View Waitlist from Dashboard

1. ## CR Dashboard.

2. Wait List

   a. Filter by Provider, Type or Reason

   b. Edit or Remove a wait list entry

To add a patient to the Wait List.:

1. Create an appointment.

2. Right click on the appointment.

3. Select **Move to Wait List**.

4. Select **Reschedule - Appointment remains on Calendar, but rebook desired**

5. Enter the priority – this dictates where the entry will appear in the wait list order.

6. Add details of when the patient would like the appointment in the Preferred Booking (free text) section.

7. Click **OK** button.

or

1. Go dashboard -> appointment -> Select wait list.

2. Click new on the right corner.

3. Enter patient name.

4. Fill required information.

5. Click on create appointment button.

Note:

- The appointment will be in the calendar and an entry will appear on the wait list.

- If a Patients original appointment is attended (no reschedule occurs) then the wait list entry will automatically 'drop off' when the appointment status is set to completed.
- If the entry is moved from the Wait List to the calendar at a later stage, the original appointment will be marked with the status of Cancelled. Refer to Moving a Patient from the Wait List
- If the entry is deleted from the Wait List, the original appointment will not be changed in any way. See Deleting an entry from the Wait List