webPAS Waiting List User Guide NZ

Software Release V10

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1 Introduction

This user guide describes the use of the webPAS Waiting List module.

It details the facilities that comprise the Waiting List module, including the various screens and fields. It also describes processes and procedures in which the Waiting List module can be used.

Although this guide makes assumptions about the business rules for a generic installation, a given site will have its own business rules and the way in which the Waiting List module is used at your site may differ from the description in this guide.

In addition, the flexibility of the webPAS enables sites to configure the Waiting List module to a sites specific requirement, including the layout of screens. Therefore not all fields described in this guide will be available to your configuration and indeed, additional (user-defined) fields may also be available. For details about your site's configuration, contact your CSC Solution Consultant.

Despite the diversity of needs in the health industry, organisations tend to operate in similar ways. The Waiting List user guide should be a useful resource and form a sound basis for in-house documentation developed for your site's particular configuration.

The Waiting List module provides the functionality to:

- Add patients to the Waiting List
- Manage the Waiting Lists by updating the status of patients on the Waiting List
- View the list by Unit, Doctor or Date
- Make admission and operation booking for patients on the list
- Print Letters for patients on the list.

The following diagram shows the modules to which Waiting List is linked:

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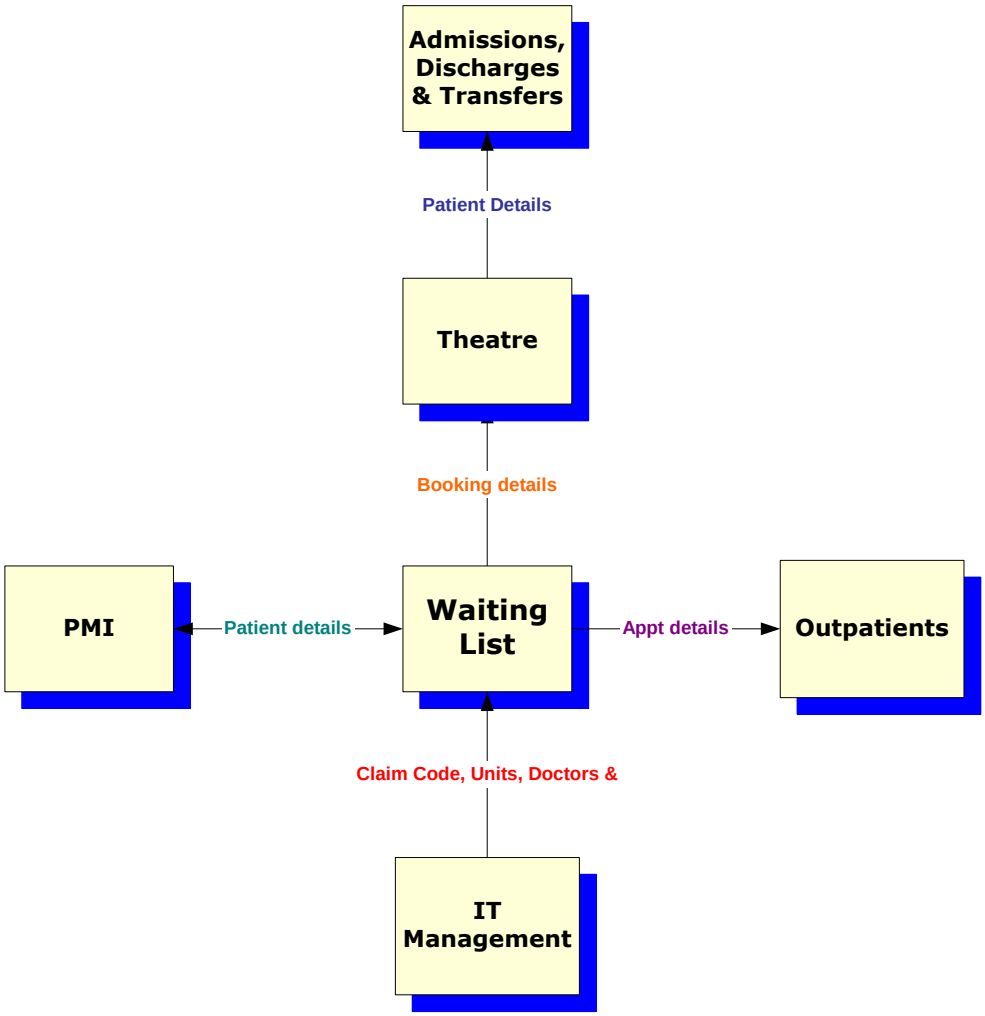

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1.1 How This Guide is Organised

This guide describes how to use the Waiting List module and is intended for use by Waiting List staff.

The Waiting List module can be configured with the Theatre module to enable the transfer of information from the Waiting List to Theatre and then to the Inpatient module for admission.

The facilities of the webPAS Waiting List module are divided into the following main areas:

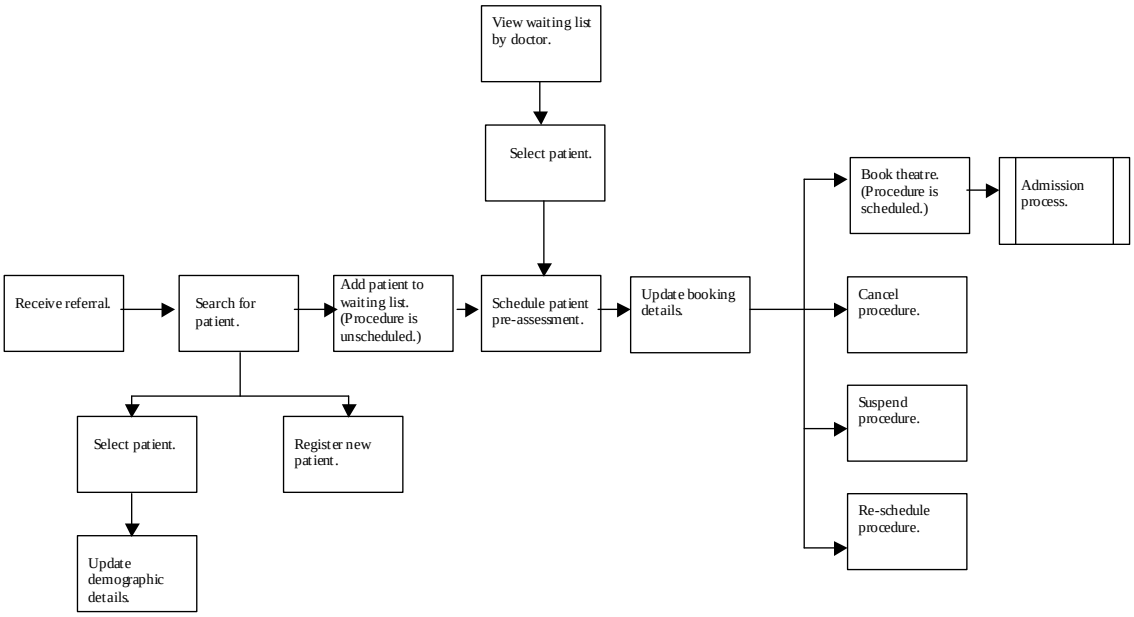
1.1.1 Enquiries

The Waiting List module is equipped with useful facilities for making enquiries on referral data during day-to-day operations. It enables users to search for a patient according to selection criteria and display details associated with a particular referral.

Once a patient is selected, users can perform various patient-specific tasks, such as viewing visits and referrals associated with a patient.

1.1.2 Waiting List Activities

The diagram below illustrates a summary of events in the Waiting List module.



For more information about the common activities performed using Waiting List, refer to the section Waiting List Activities.

1.1.3 Reports

The Waiting List module provides extensive reporting facilities for patient information, bed days and wait list times.

For more information about the reports, refer to the section Waiting List Reports.

1.2 Related Documentation

This user guide should be read in conjunction with the webPAS Standard Conventions User Guide, the webPAS ACC User Guide, the webPAS PMI User Guide and the webPAS Theatre User Guide.

Many of the options available in the Waiting List module are common functionality with the PMI and are described in detail in the webPAS PMI User Guide.

The webPAS Waiting List Configuration Guide details the set-up required for system parameters and Categories and Codes.

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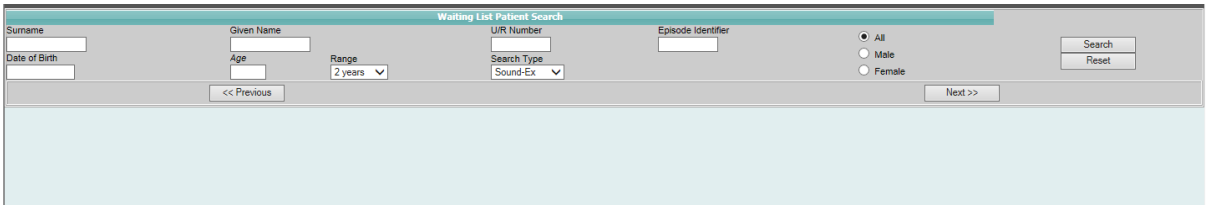
2 Searching for a Patient

2.1.1 Waiting List Search

The Waiting List search is performed in the same way as a local search; however the list of patients returned includes only those matching the search criteria with a Waiting List entry.

1. Select **Waiting List Search** from the appropriate patient level drop down menu.

The Waiting List Patient Search screen will display.

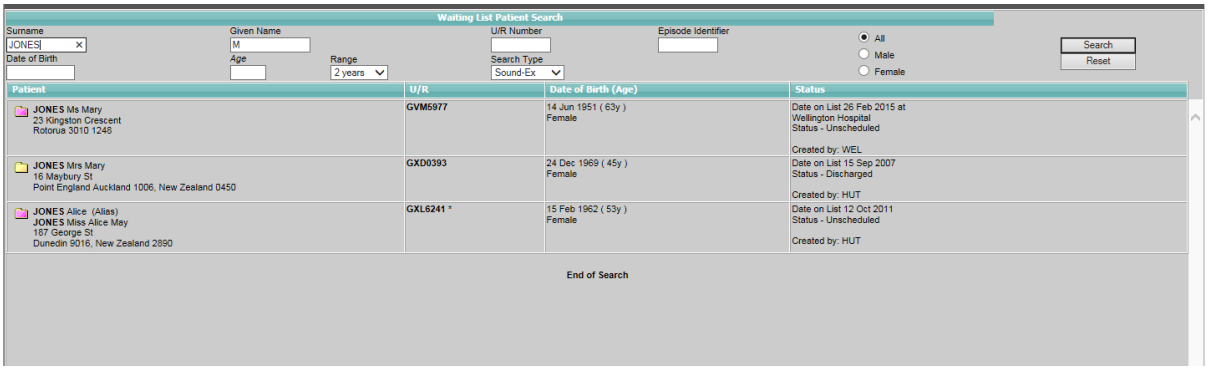


2. Complete the search criteria.

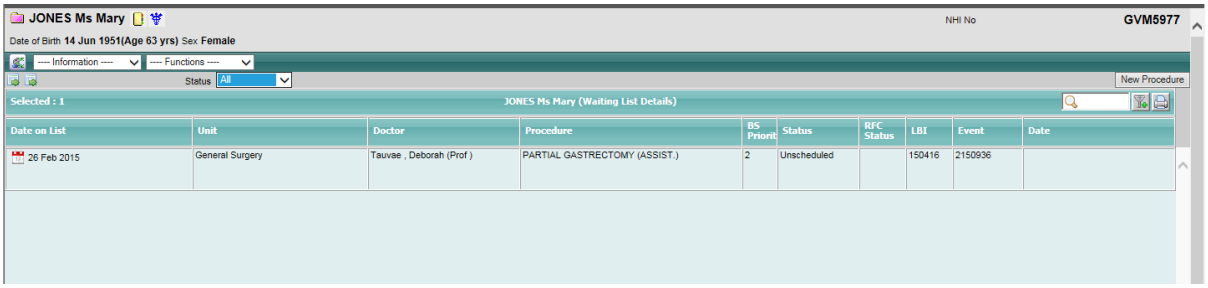
3. Click **Search**.

Matching records with a Waiting List entry will be returned.

The Waiting Status is displayed with the date that the patient was placed on the Waiting List.



4. Click the relevant patient folder to access the patient's Waiting List Details screen.



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3 List Views

This section describes how to display and work with Waiting List module list views.

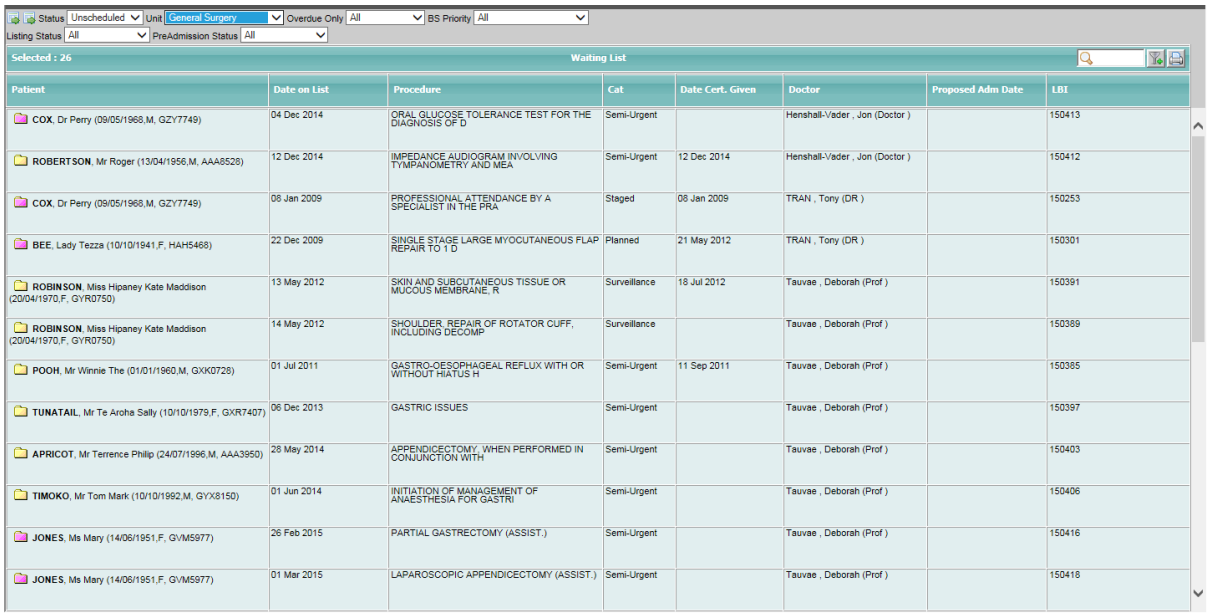
3.1.1 Displaying a List

There are many lists throughout the webPAS which filter information for the user. The lists that are available to you depend on the permissions associated with the user's security account.

Some of the hospital level lists that are available in the webPAS Waiting List module include:

- Waiting Lists - Unscheduled
- Waiting Lists by Unit
- Waiting Lists by Date
- Waiting Lists by Doctor
- Booking Contacts Scheduled
- Booking Contacts Short Notice
- Pre-Assessment List
- Waiting List Extract

1. Select a Waiting List View option from the appropriate hospital level drop down list.



Patient	Date on List	Procedure	Cat	Date Cert. Given	Doctor	Proposed Adm Date	LBI
COX, Dr Perry (09/05/1968,M, GZY7749)	04 Dec 2014	ORAL GLUCOSE TOLERANCE TEST FOR THE DIAGNOSIS OF D	Semi-Urgent		Henshall-Vader , Jon (Doctor)		150413
ROBERTSON, Mr Roger (13/04/1956,M, AAA8528)	12 Dec 2014	IMPEDANCE AUDIOGRAM INVOLVING TYMPANOMETRY AND MEA	Semi-Urgent	12 Dec 2014	Henshall-Vader , Jon (Doctor)		150412
COX, Dr Perry (09/05/1968,M, GZY7749)	08 Jan 2009	PROFESSIONAL ATTENDANCE BY A SPECIALIST IN THE PRA	Staged	08 Jan 2009	TRAN , Tony (DR)		150253
BEE, Lady Tezza (10/10/1941,F, HAH5468)	22 Dec 2009	SINGLE STAGE LARGE MYOCUTANEOUS FLAP REPAIR TO 1 D	Planned	21 May 2012	TRAN , Tony (DR)		150301
ROBINSON, Miss Hipaney Kate Maddison (20/04/1970,F, GYR0750)	13 May 2012	SKIN AND SUBCUTANEOUS TISSUE OR MUCOUS MEMBRANE, R	Surveillance	18 Jul 2012	Tauvae , Deborah (Prof)		150391
ROBINSON, Miss Hipaney Kate Maddison (20/04/1970,F, GYR0750)	14 May 2012	SHOULDER, REPAIR OF ROTATOR CUFF, INCLUDING DECOMP	Surveillance		Tauvae , Deborah (Prof)		150389
POOH, Mr Winnie The (01/01/1960,M, GXK0728)	01 Jul 2011	GASTRO-OESOPHAGEAL REFLUX WITH OR WITHOUT HIATUS H	Semi-Urgent	11 Sep 2011	Tauvae , Deborah (Prof)		150385
TUNATAIL, Mr Te Aroha Sally (10/10/1979,F, GXR7407)	06 Dec 2013	GASTRIC ISSUES	Semi-Urgent		Tauvae , Deborah (Prof)		150397
APRICOT, Mr Terrence Philip (24/07/1996,M, AAA3950)	28 May 2014	APPENDICECTOMY, WHEN PERFORMED IN CONJUNCTION WITH	Semi-Urgent		Tauvae , Deborah (Prof)		150403
TIMOKO, Mr Tom Mark (10/10/1992,M, GYX8150)	01 Jun 2014	INITIATION OF MANAGEMENT OF ANAESTHESIA FOR GASTRI	Semi-Urgent		Tauvae , Deborah (Prof)		150406
JONES, Ms Mary (14/06/1951,F, GVM5977)	26 Feb 2015	PARTIAL GASTRECTOMY (ASSIST.)	Semi-Urgent		Tauvae , Deborah (Prof)		150416
JONES, Ms Mary (14/06/1951,F, GVM5977)	01 Mar 2015	LAPAROSCOPIC APPENDICECTOMY (ASSIST.)	Semi-Urgent		Tauvae , Deborah (Prof)		150418

- The view toggle icon allows the view to be changed.
- The drop down lists (i.e. Status, Unit) enables users to apply filters to the list which will either broaden or narrow the results that are returned. The filters default to All.

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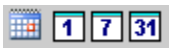
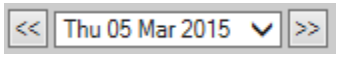
- The calendar icons  and the calendar look up  enable users to select date ranges. This allows users to filter out records that are either too old or too recent.
- Column headings will sort the data when they are clicked.
- The list can be printed by clicking the printer icon at the top of the list.
- The list can be filtered by typing text into the search box.

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4 Waiting List Activities

This section describes how to:

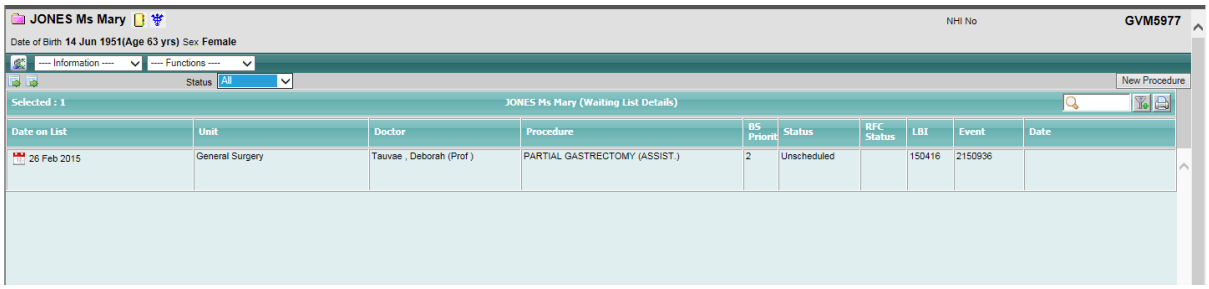
- Check for existing Waiting List entries
- Add a patient to the Waiting List
- Access Waiting List details
- Access the Patient Visit List
- Suspend a Waiting List entry
- Create a Theatre booking
- Remove a patient from the waiting list

4.1 Viewing a Waiting List Entry

1. Select the required patient.
2. Navigate to the Patient Demographic screen.
3. Select **Waiting List** from the appropriate patient level drop down menu.

The Waiting List Details screen will display.

Note: Alternatively, use the **Waiting List Search** function from the hospital level **Search** drop down menu. This function prompts the user to search and retrieve the required patient (only shows patients with existing Waiting List entries), and defaults straight to the Waiting List Details screen for that patient.



The Waiting List Details screen will display the following information.

- Date the entry was added to the Waiting List
- Associated Unit
- Doctor
- Primary procedure to be performed

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- Booking Status Priority
- Ready For Care (RFC) status
- Local Booking Identifier Number
- Event Number
- Date the admission is confirmed (date patient is actually admitted)

Click the calendar icon to view the Waiting List Details screen for a specific entry.

Note: Click the icon to change the view to see difference Waiting List entry information.

The Waiting List entries displayed can be filtered by Status, using the Status drop down menu at the top of the screen. Status filter options include All, Unscheduled, Scheduled, Pre-admitted, Admitted, Discharged or Removed.

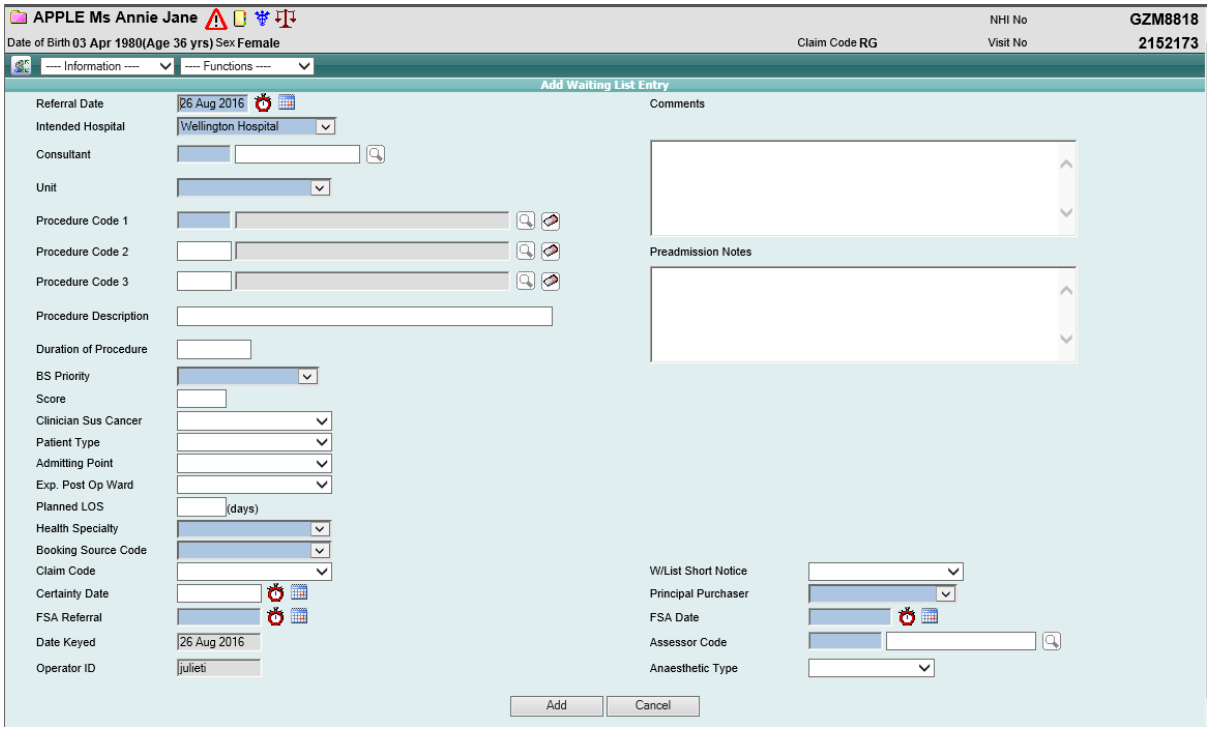
4.2 Adding a Patient to the Waiting List

1. Select the required patient.
2. Select **Waiting List** from the appropriate patient level drop down menu.

The Waiting List Details screen will display.

3. Click **New Procedure**.

The Add Waiting List Entry screen will display.



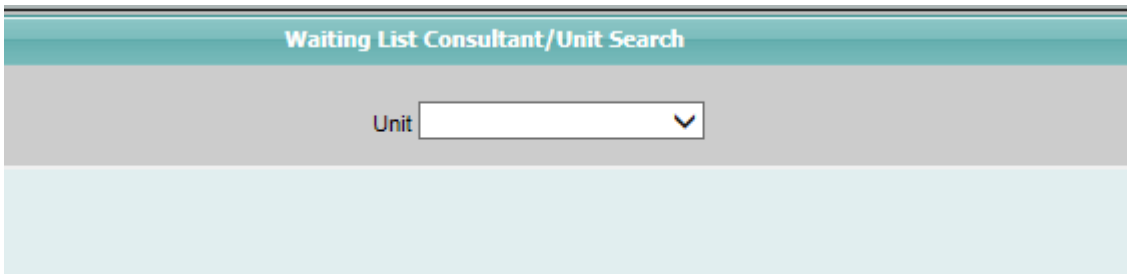
4. Enter the **Referral Date**.

The **Referral Date** value will default to the current date. If required, change using the Calendar Lookup icon or the Date/Time Stamp icon .

5. Enter the **Intended Hospital** required.

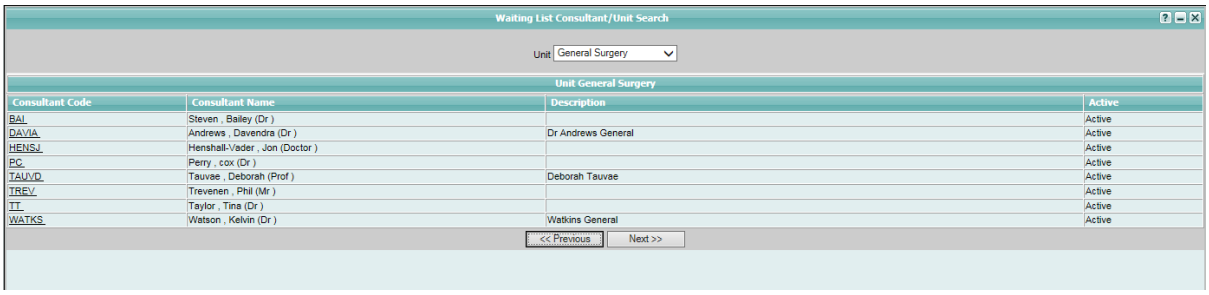
6. Enter the Consultant code, or click the lookup icon to search for the required code.

The Waiting List Consultant/Unit screen will display.



7. Select the required Unit from the drop down list.

All consultants linked to the selected Unit will display.



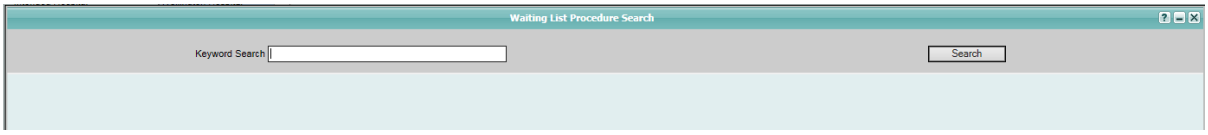
8. Select the required Consultant Code to select the consultant.

The system returns the user to the Add Waiting List Entry screen and populates the Consultant and Unit fields.

Note: If a Consultant belongs only to one Unit, the system will auto-populate that Unit to the Unit field. If the Consultant belongs to more than one Unit, the user will be required to select the appropriate value from the Unit drop down list.

9. Enter up to **3 Procedure Codes** or click the search icon to perform a Procedure Code search.

The Waiting List Procedure Search screen will display.



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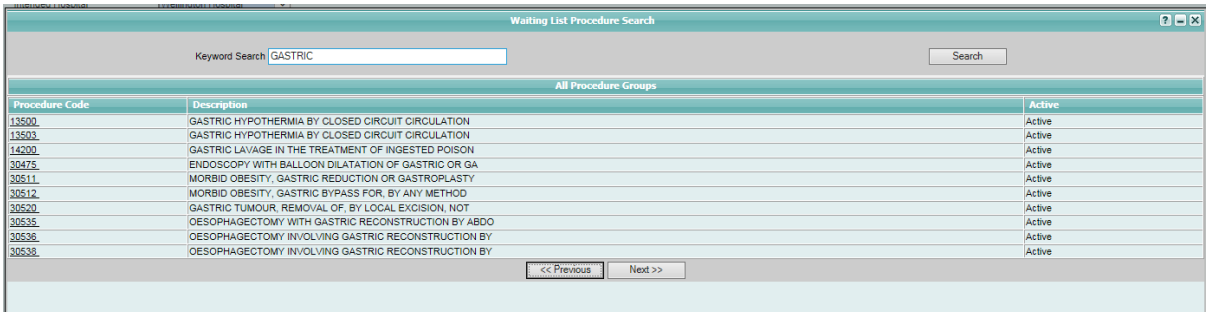
10. Enter the starting letter/s of the procedure description in the Search Starting with field.

11. Click **Search**.

All matching procedure codes for the specified unit are displayed.



12. Click the required **Procedure Code** to select the procedure.

The system returns the user to the Add Waiting List Entry screen, with the CMBS Code and Procedure fields populated.

Note: The Procedure Code defaults the Procedure Description into the Procedure field. It is possible to add or change information in this field if the description is not adequate.

13. Enter the **Duration of Procedure** if required.

14. Select a value from the **Booking Status Priority** drop down list.

Note: Selecting a code that is flagged as **Staged** or **Planned** will make the **Certainty Date** field mandatory.

15. Enter the **CPAC Score**. This is a 1-100 scoring system.

16. Select the **Clinician Sus Cancer** from the drop down list.

17. Select the **Patient Type** from the drop down list.

18. Select the **Admitting Point** from the drop down list.

19. Select the **Exp. Post Op Ward** from the drop down list.

20. Enter the **Planned Length of Stay** in days.

Note: 0 should be entered for day patients, a value of 1 (or greater) should be entered for overnight stays.

21. Select the **Health Specialty** from the drop down list.

22. Select the **Booking Source Code** from the drop down list.

23. Select the **Claim Type** from the drop down list.

24. Enter a **Certainty Date.**

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Note: Selecting a **Booking Status Priority** code that is flagged as **Staged** or **Planned** will make the **Certainty Date** field mandatory.

The **Certainty Date** value will default to the blank. Select a Date using the Calendar Lookup icon or the Date/Time Stamp icon .

25. Enter a **FSA Referral Date.**

Note: The **FSA Referral Date** must be on or before the **Referral Date** and the **FSA Date**.

The **First Specialist Assessment Referral Date** value will default to the blank. Select a Date using the Calendar Lookup icon or the Date/Time Stamp icon .

26. The **Date Keyed** will default to the current date. This field cannot be changed.
27. The **Operator ID** will default to the current user logged on. This field cannot be changed.
28. Enter any relevant **Comments**. This is a free-format text field.
29. Enter any relevant **Preadmission Notes.** This is a free-format text field.
30. Select a **W/List Short Notice** value from the drop down list, if known.
31. Select the **Principle Purchaser** from the drop down list.
32. Enter a **FSA Date.**

Note: The **FSA Date** must be on or before the **Referral Date** and must be on of after the **FSA Referral Date**.

The **First Specialist Assessment Date** value will default to the blank. Select a Date using the Calendar Lookup icon or the Date/Time Stamp icon .

33. Enter the **Assessor Code** or click the search icon to perform an HCP search.
34. Select the **Anaesthetic Type** from the drop down list.
35. Click **Ok**.

The record is saved.

36. Print **Labels** and **Letters** as required.

The system returns to the Waiting List Details screen for the patient.

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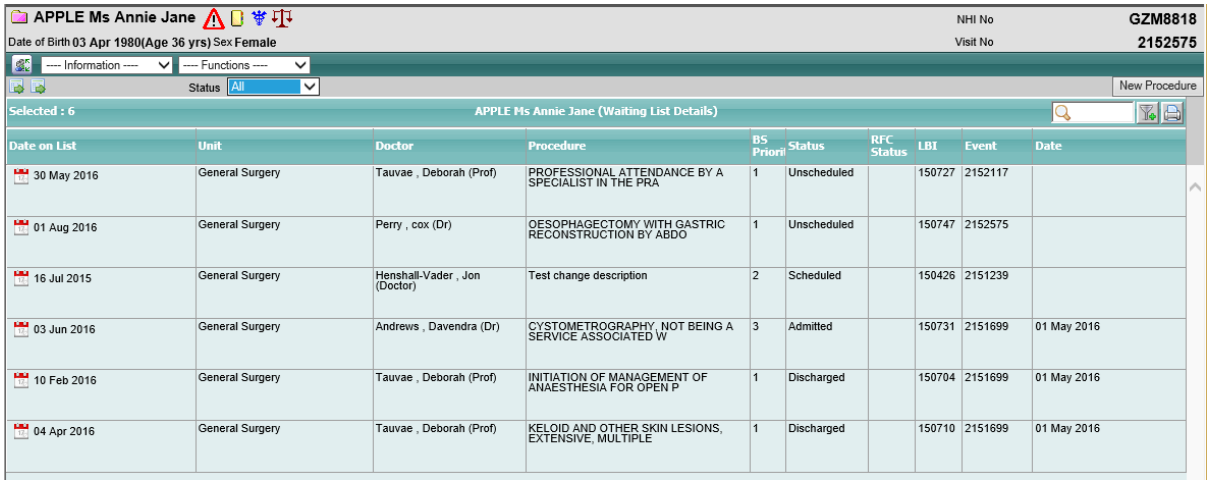
4.3 Accessing Waiting List Details

1. Select the required patient.

2. Select **Waiting List** from the appropriate patient level drop down menu.

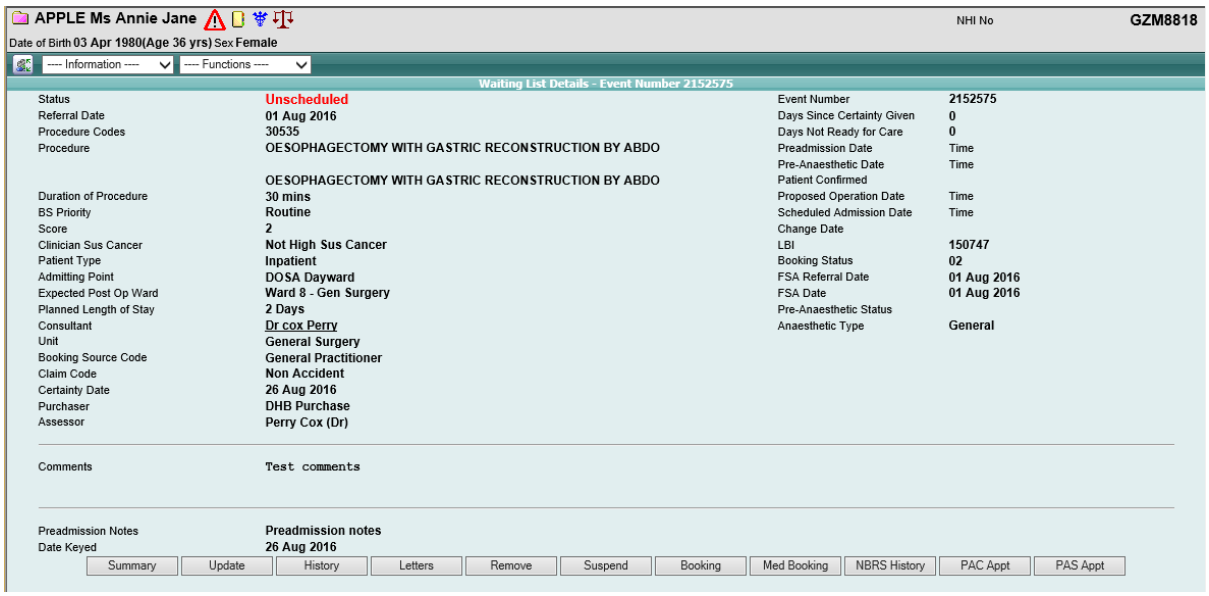
The Waiting List Details screen will display.

Note: Alternatively, the **Waiting List Search** function (available from the hospital level Search drop down menu) can be used. This function prompts the user to search and retrieve the required patient (only shows patients with existing Waiting List entries), and defaults to the Waiting List Details screen for that patient.



3. Click the calendar icon beside the required Waiting List entry.

The Waiting List Details screen will display.



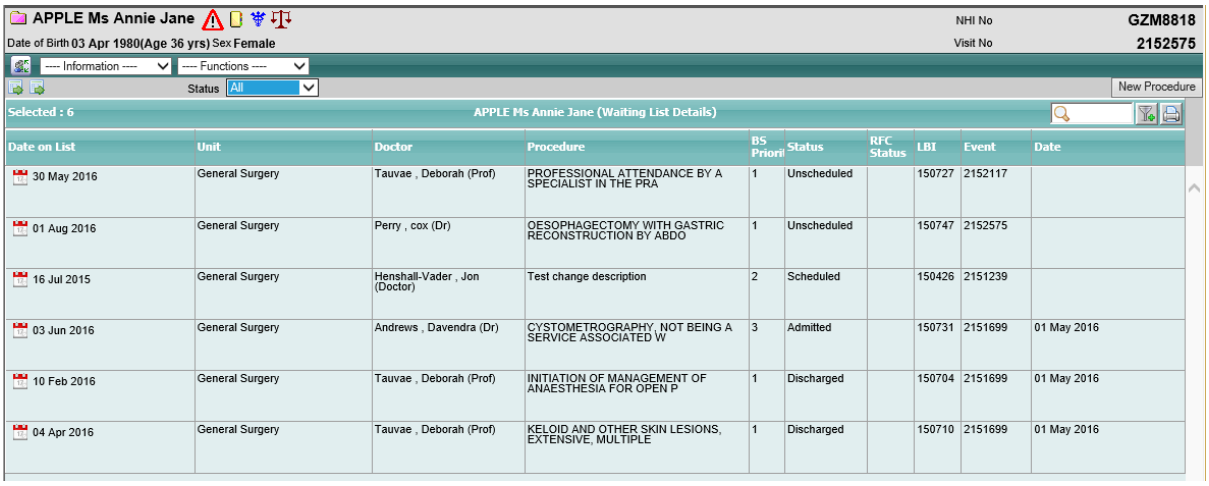
All of the information entered on the Waiting List Entry screen will display. Use this screen to:

- Update the waiting list entry details
- View a History of the waiting list entry
- View printed Letters or Print a new Letter
- Remove the entry from the Waiting List
- Suspend the waiting list entry
- Make a Theatre Booking
- Make a Medical Booking
- View the NBRS History of the waiting list entry
- Make an Outpatient appointment to a Pre-assessment Clinic
- Make an Outpatient appointment to a Pre-anaesthetic Clinic

4.3.1 Updating a Waiting List Entry

1. Select the required patient.
2. Select **Waiting List** from the appropriate patient level drop down list.

The Waiting List Details screen will display.



Date on List	Unit	Doctor	Procedure	BS Priori	Status	RFC Status	LBI	Event	Date
30 May 2016	General Surgery	Tauvae , Deborah (Prof)	PROFESSIONAL ATTENDANCE BY A SPECIALIST IN THE PRA	1	Unscheduled		150727	2152117	
01 Aug 2016	General Surgery	Perry , cox (Dr)	OESOPHAGECTOMY WITH GASTRIC RECONSTRUCTION BY ABDO	1	Unscheduled		150747	2152575	
16 Jul 2015	General Surgery	Henshall-Vader , Jon (Doctor)	Test change description	2	Scheduled		150426	2151239	
03 Jun 2016	General Surgery	Andrews , Davendra (Dr)	CYSTOMETROGRAPHY, NOT BEING A SERVICE ASSOCIATED W	3	Admitted		150731	2151699	01 May 2016
10 Feb 2016	General Surgery	Tauvae , Deborah (Prof)	INITIATION OF MANAGEMENT OF ANAESTHESIA FOR OPEN P	1	Discharged		150704	2151699	01 May 2016
04 Apr 2016	General Surgery	Tauvae , Deborah (Prof)	KELOID AND OTHER SKIN LESIONS, EXTENSIVE, MULTIPLE	1	Discharged		150710	2151699	01 May 2016

4. Click the calendar icon beside the required Waiting List entry.

The Waiting List Details screen will display.

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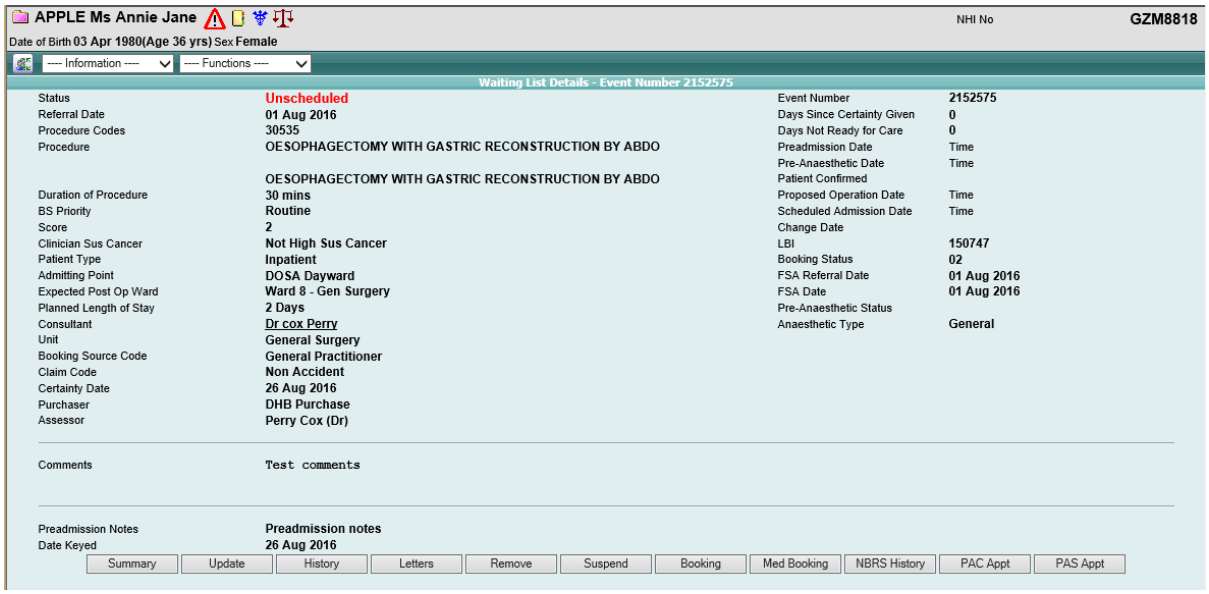
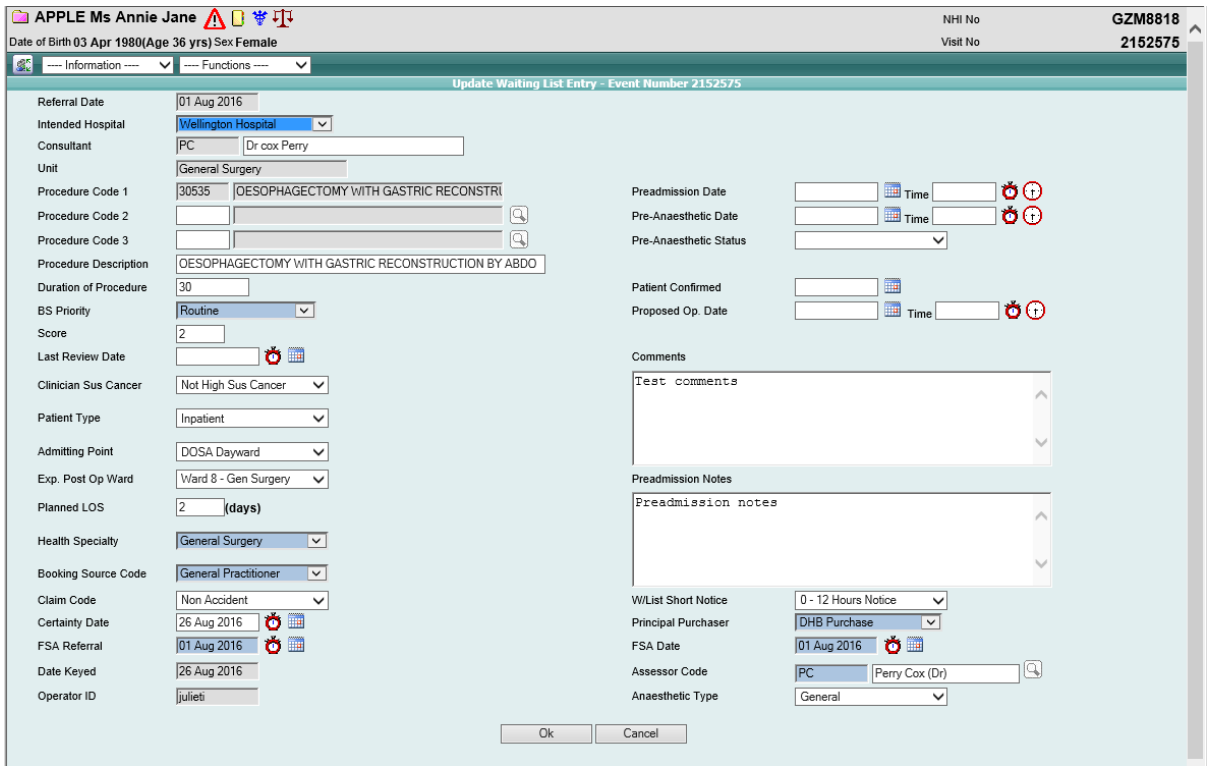


3. Click **Update**.

The Update Waiting List screen will display.



4. Change the details as required.

Note: Changes to the certain fields will write the required records for NBRS. For example:

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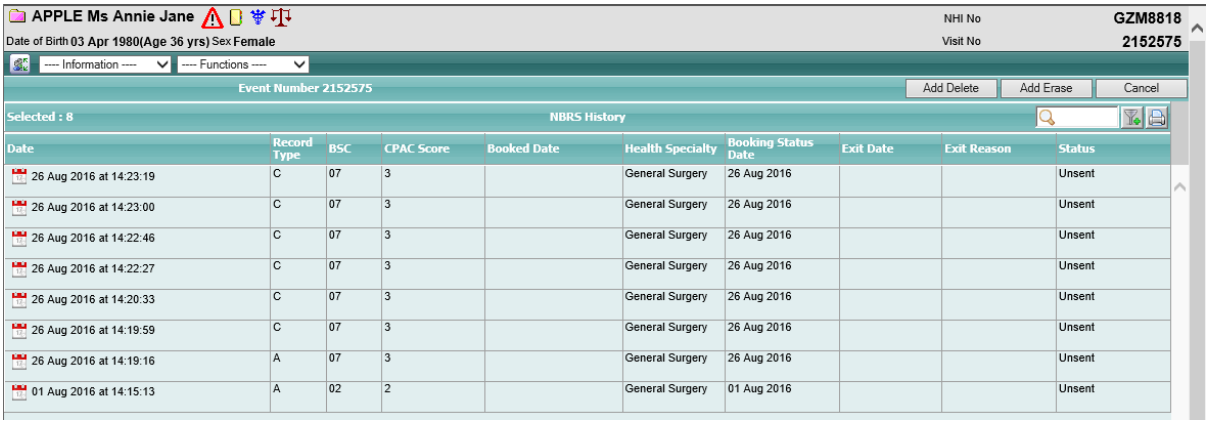
- Change of **Score** will make the **Last Review Date** mandatory and will write an '07' NBRS record.
- Change of **Booking Status Priority** to a code flagged as **Staged** or **Planned** will make the **Certainty Date** field mandatory and will write an '02' NBRS record.
- Changes to **FSA Referral Date, FSA Date, Health Specialty, Booking Source Code, Principle Purchaser** will write a Change NBRS record.



Date	Record Type	BSC	CPAC Score	Booked Date	Health Specialty	Booking Status Date	Exit Date	Exit Reason	Status
26 Aug 2016 at 14:23:19	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:23:00	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:22:46	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:22:27	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:20:33	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:19:59	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:19:16	A	07	3		General Surgery	26 Aug 2016			Unsent
01 Aug 2016 at 14:15:13	A	02	2		General Surgery	01 Aug 2016			Unsent

5. Click **Ok**.

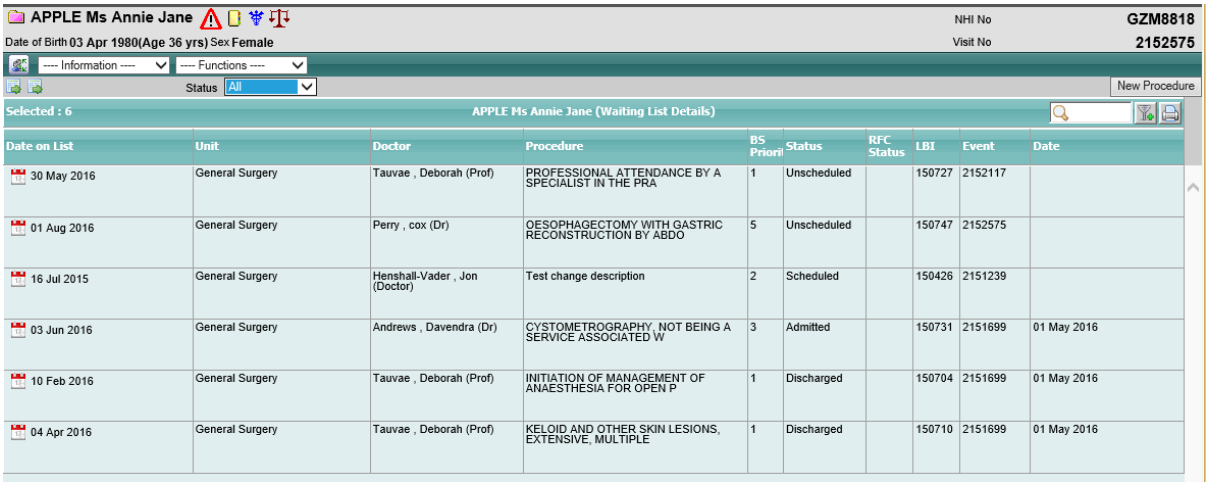
The changes are saved and the patient's Waiting List Details screen is displayed.

4.3.2 Waiting List History

The Waiting List Entry History includes details of changes made and suspensions applied to the entry.

1. Select the required patient.
2. Select **Waiting List** from the appropriate patient level drop down list.

The Waiting List Details screen will display.



Date on List	Unit	Doctor	Procedure	BS Priorit	Status	RFC Status	LBI	Event	Date
30 May 2016	General Surgery	Tauvae , Deborah (Prof)	PROFESSIONAL ATTENDANCE BY A SPECIALIST IN THE PRA	1	Unscheduled		150727	2152117	
01 Aug 2016	General Surgery	Perry , cox (Dr)	OESOPHAGECTOMY WITH GASTRIC RECONSTRUCTION BY ABDO	5	Unscheduled		150747	2152575	
16 Jul 2015	General Surgery	Henshall-Vader , Jon (Doctor)	Test change description	2	Scheduled		150426	2151239	
03 Jun 2016	General Surgery	Andrews , Davendra (Dr)	CYSTOMETROGRAPHY, NOT BEING A SERVICE ASSOCIATED W	3	Admitted		150731	2151699	01 May 2016
10 Feb 2016	General Surgery	Tauvae , Deborah (Prof)	INITIATION OF MANAGEMENT OF ANAESTHESIA FOR OPEN P	1	Discharged		150704	2151699	01 May 2016
04 Apr 2016	General Surgery	Tauvae , Deborah (Prof)	KELOID AND OTHER SKIN LESIONS, EXTENSIVE, MULTIPLE	1	Discharged		150710	2151699	01 May 2016

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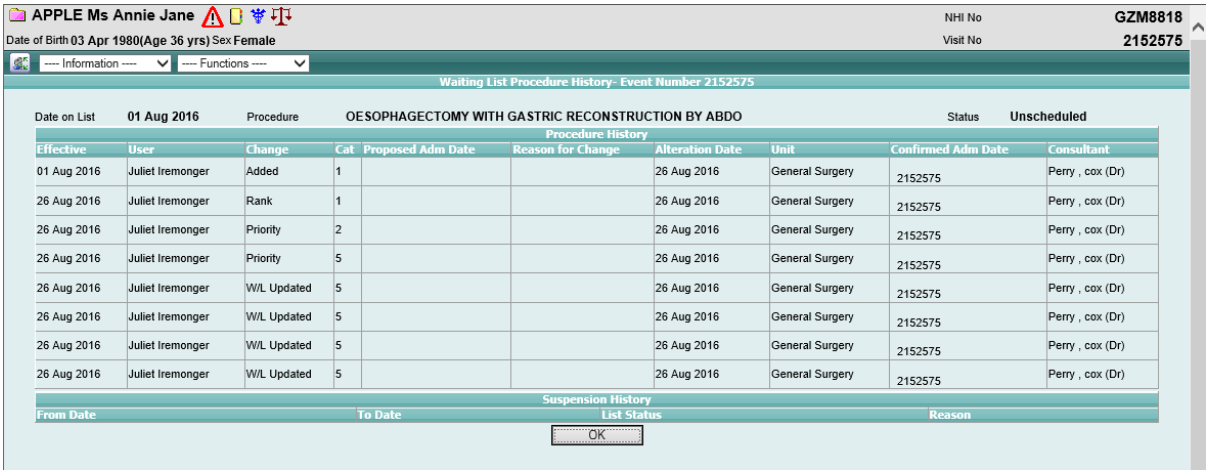
5. Click the calendar icon beside the required Waiting List entry.

The Waiting List Details screen will display.

Click **History**.

The Waiting List Procedure History screen will display.



3. Click **Ok**.

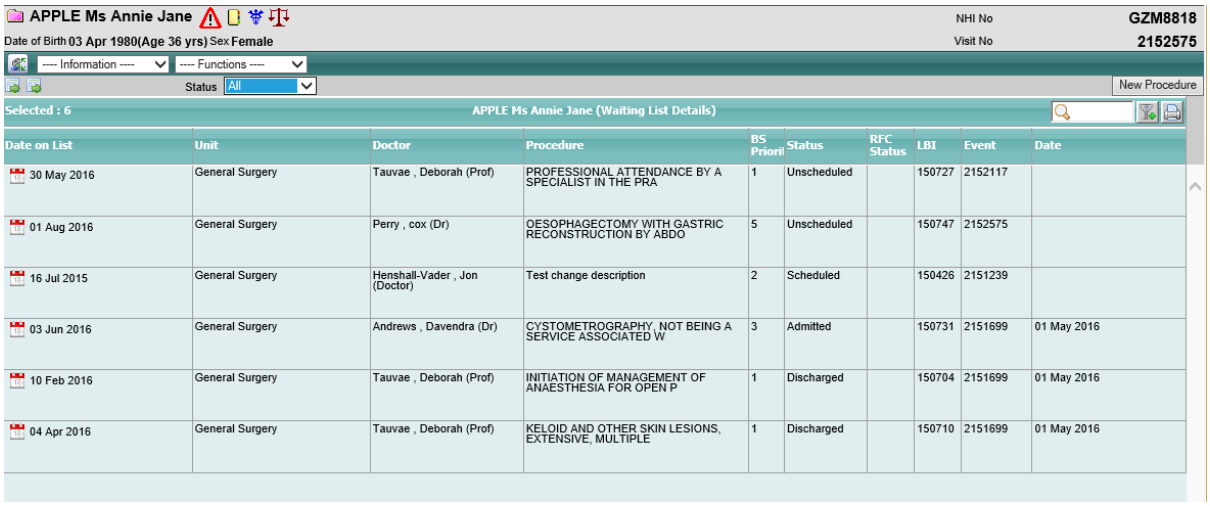
4.3.3 Patient Waiting List Letters

The Waiting List module enables users to print Waiting List letters for patients. It also maintains a history of letters that have already been printed and sent to a patient.

1. Select the required patient.

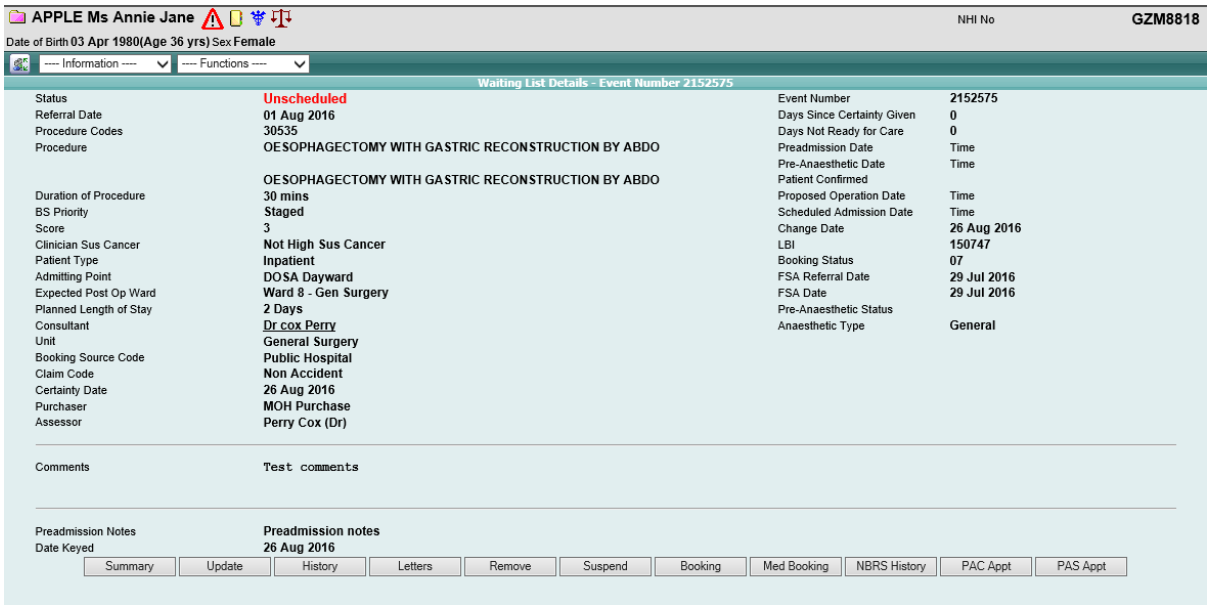
2. Select **Waiting List** from the appropriate patient level drop down list.

The Waiting List Details screen will display.



3. Click the calendar icon beside the required Waiting List entry.

The Waiting List Details screen will display.



4. Click **Letters**.

The Waiting List Letters screen will display.

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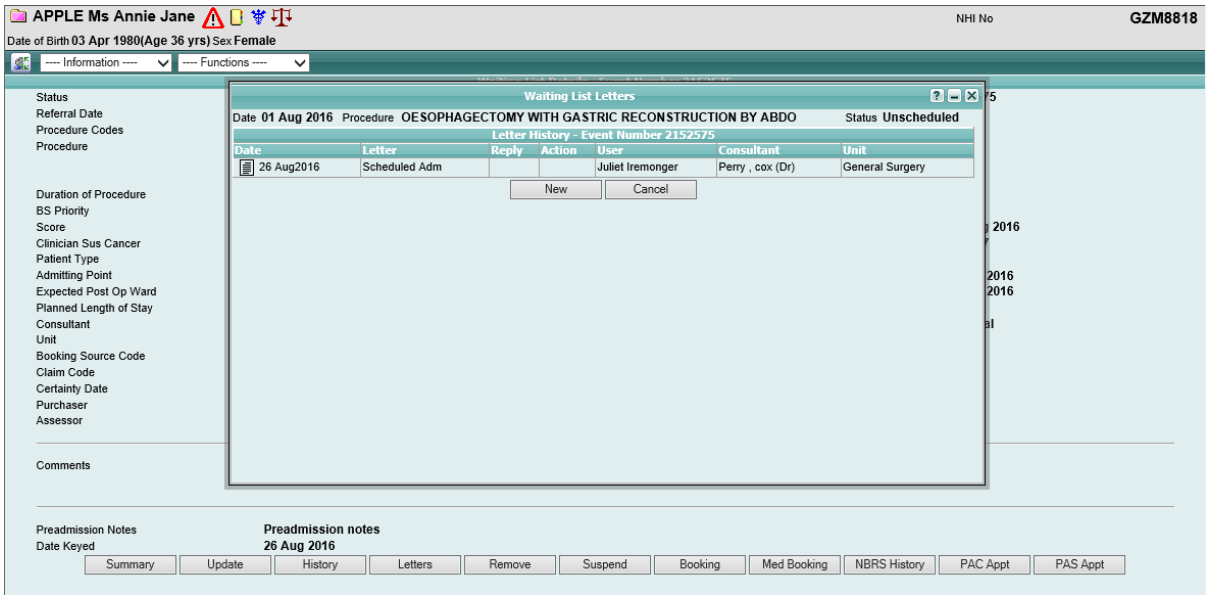
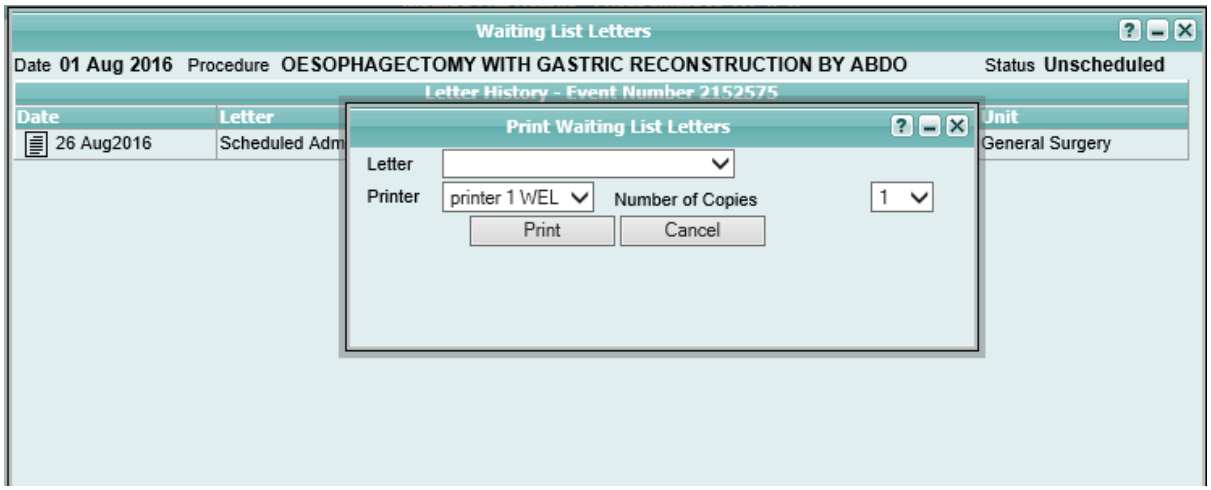


5. Click **New**.

The Print Waiting List Letters screen will display.



6. Select the required letter from the list.

7. Select the printer.

8. Click **Print**.

The letter will be printed and the Waiting List Letters history screen will display a record for the letter that has been printed.

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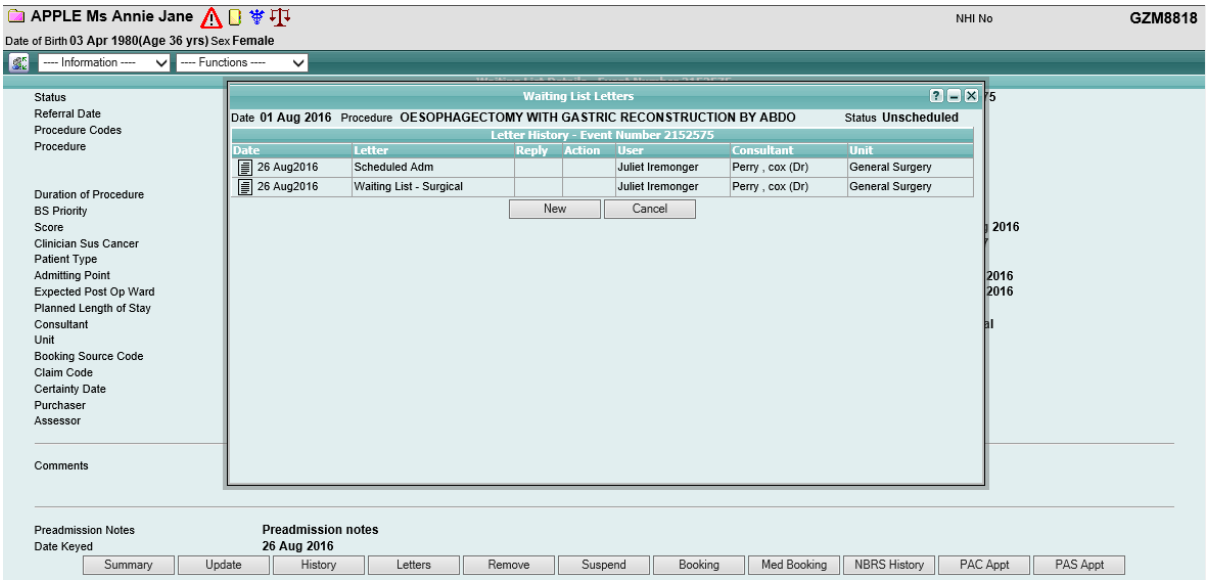
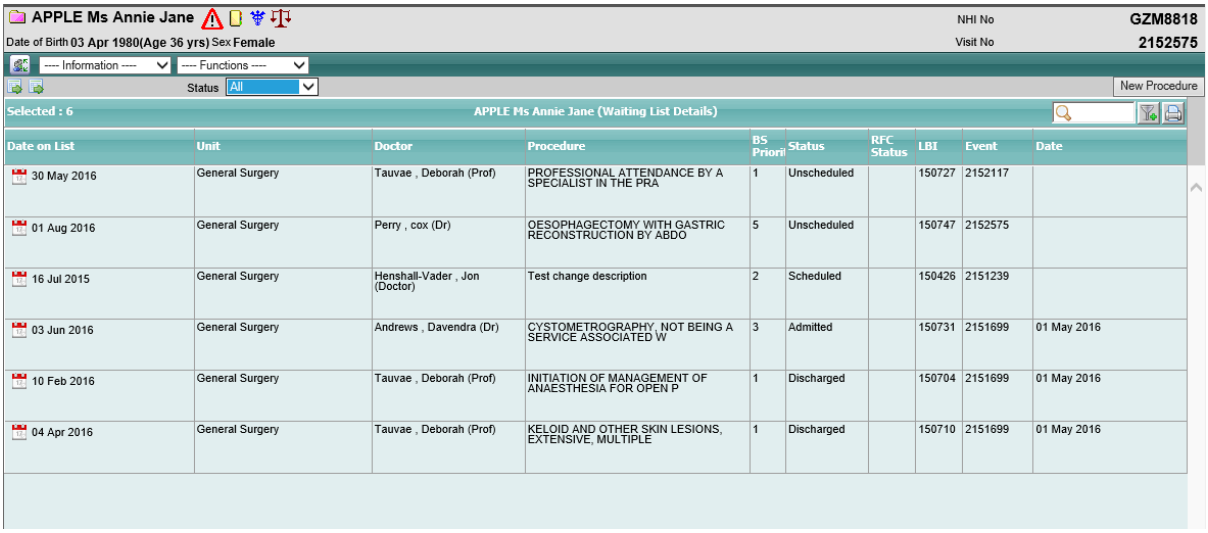


4.3.3.1 Updating Waiting List Patient Letter History

1. Select the required patient.

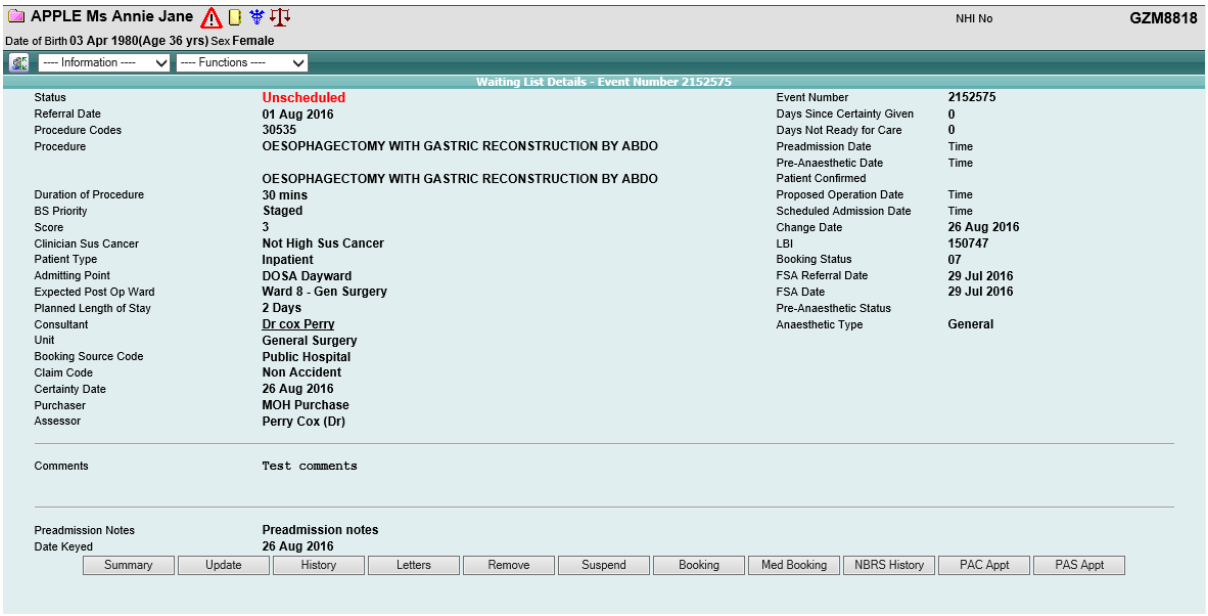
2. Select **Waiting List** from the appropriate patient level drop down list.

The Waiting List Details screen will display.



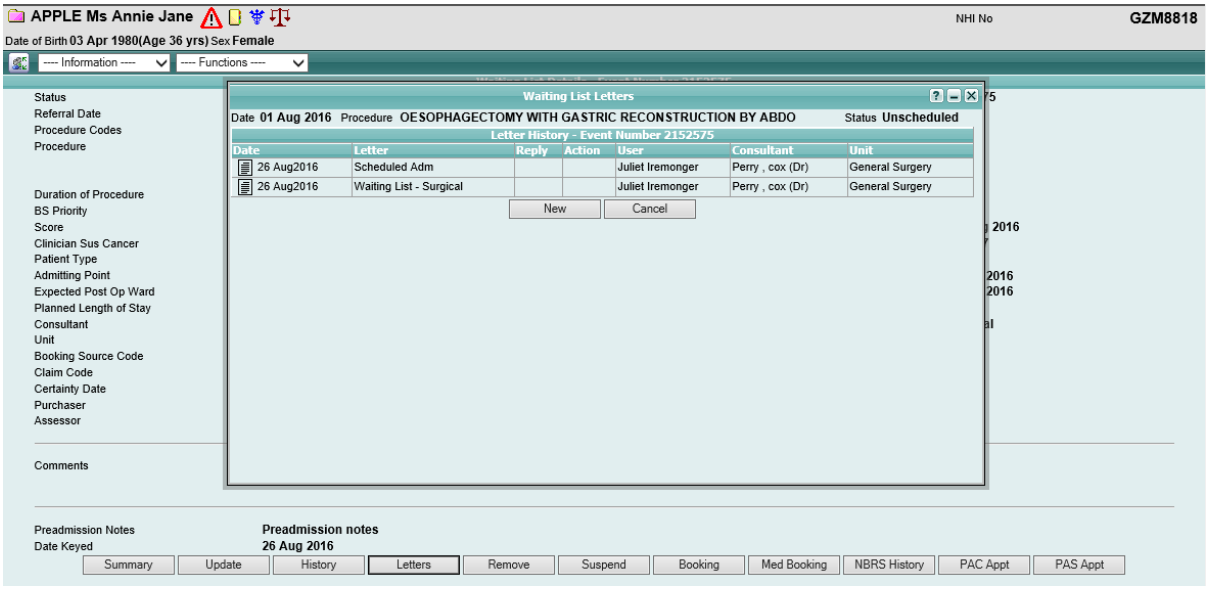
3. Click the calendar icon beside the required Waiting List entry.

The Waiting List Details screen will display.



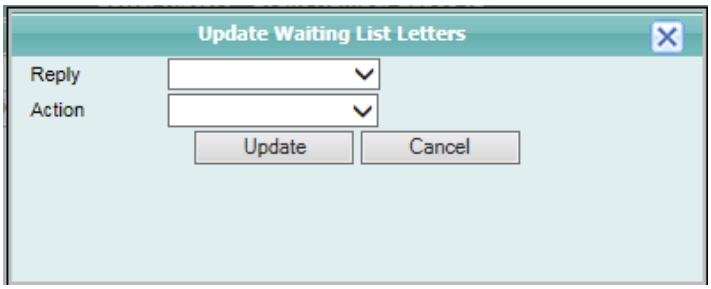
4. Click **Letters**.

The Waiting List Letters screen will display.



5. Click the letter icon beside the required record.

The Update Waiting List Letters screen will display.

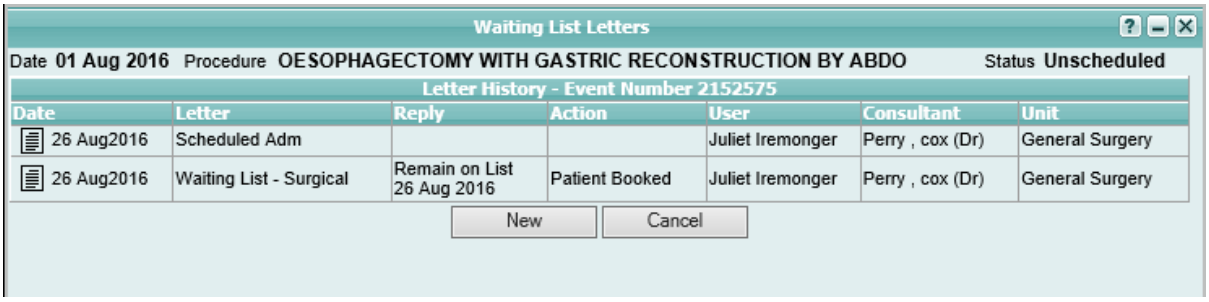


6. Select a value from the **Reply** drop down list.

7. Select a value from the **Action** drop down list.

8. Click **Update**.

The Waiting List Letters history screen is updated.



9. Click **Cancel** to return to the patient's Waiting List Details screen.

4.4 Removing an Entry from the Waiting List

If a patient no longer requires the procedure for which they were placed on the Waiting List, users can remove the entry from the hospital Waiting List.

1. Select the required patient.

2. Select **Waiting List** from the appropriate patient level drop down list.

The Waiting List Details screen will display.

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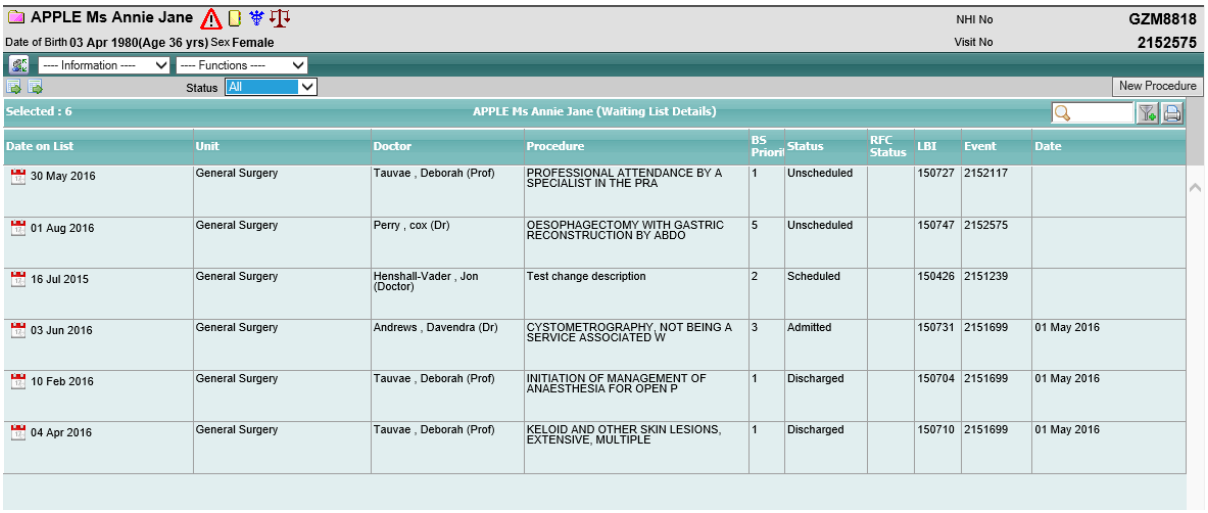
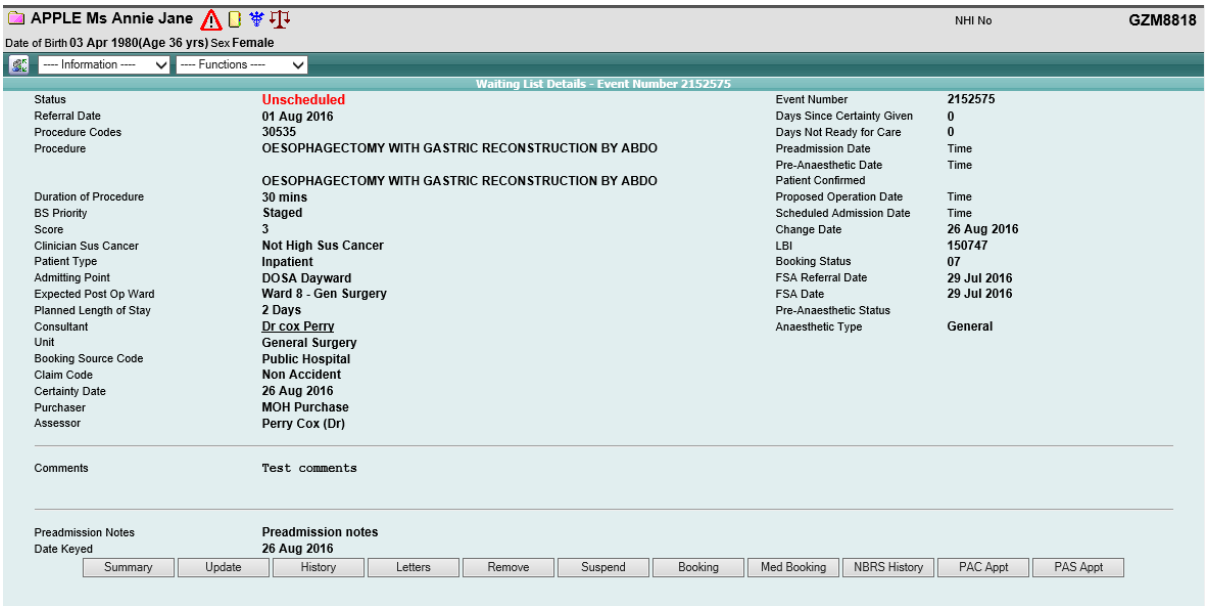


3. Click the calendar icon beside the required Waiting List entry.

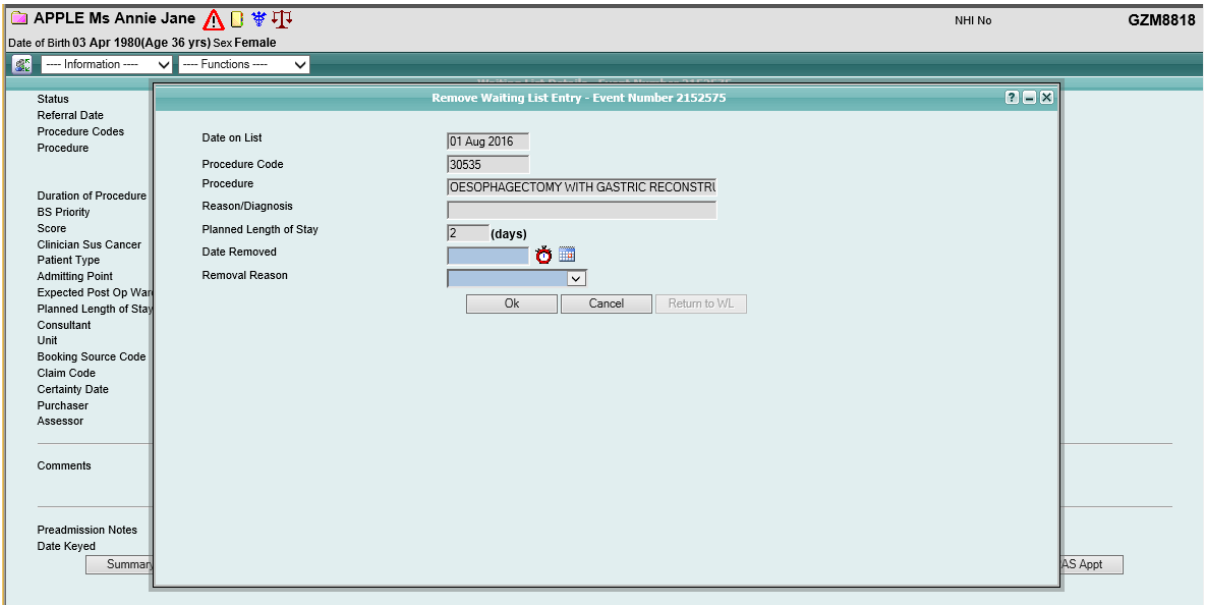
The Waiting List Details screen will display.



4. Click **Remove**.

The Remove Waiting List Entry screen will display.

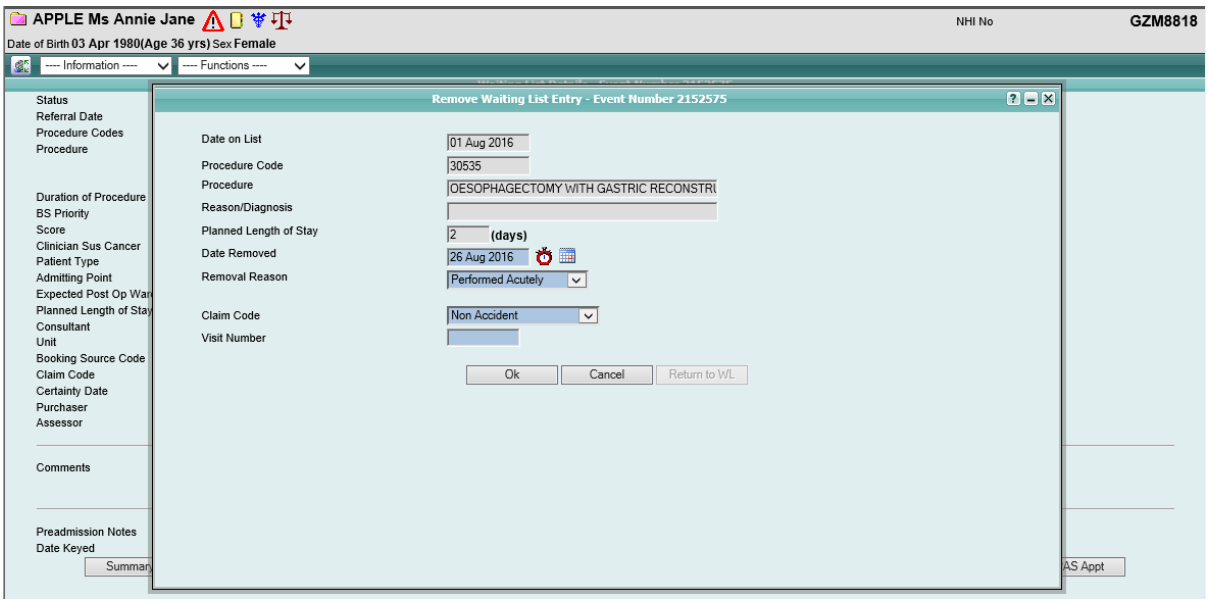
Note: The Return to WL button is not accessible to users because the entry has not yet been removed from the list and therefore cannot be reinstated.



5. Enter the date of removal.

6. Select a value from the Reason for Removal drop down list.

Note: If users select a reason such as **Performed Acutely**, they will be required to select a **Claim Code** and **Visit Number** as shown below.



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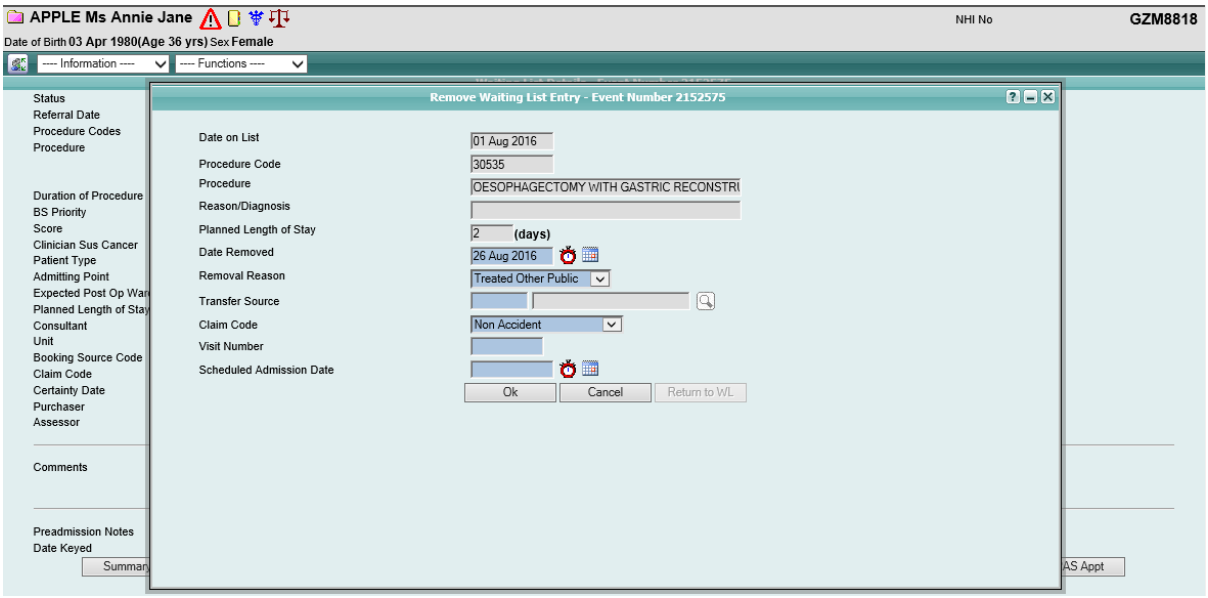
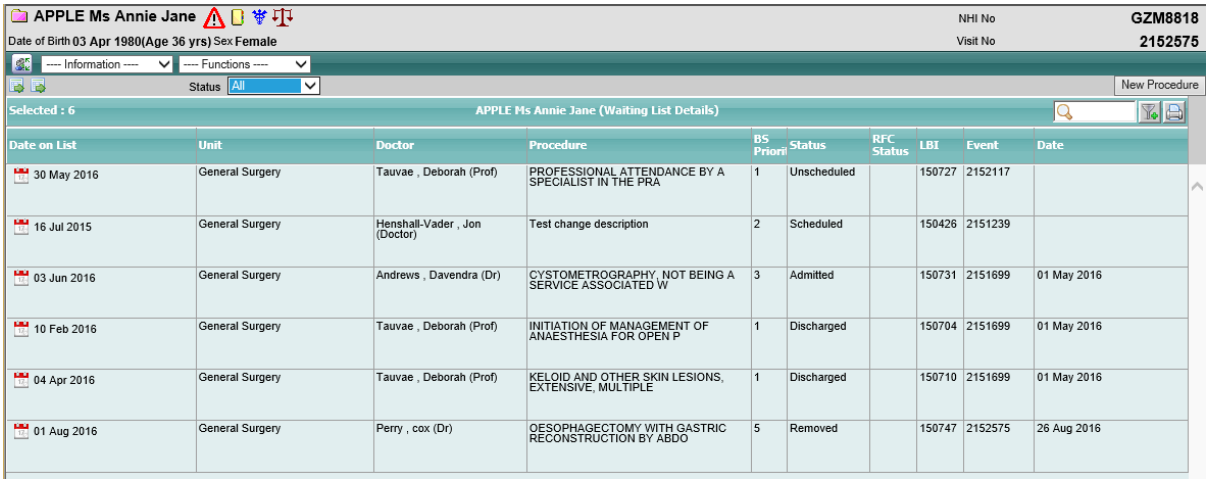
Note: If users select a reason such as **Treated Other Facility**, they will be required to select a **Transfer Source** code, **Claim Code**, **Visit Number** and **Scheduled Admission Date** as shown below.



7. Click **Ok**.

The Waiting List Entry will be removed from the list; however, the information is not removed from the Summary screen, rather it is displayed with a status of Removed.



Date on List	Unit	Doctor	Procedure	BS Priorit	Status	RFC Status	LBI	Event	Date
30 May 2016	General Surgery	Tauvae , Deborah (Prof)	PROFESSIONAL ATTENDANCE BY A SPECIALIST IN THE PRA	1	Unscheduled		150727	2152117	
16 Jul 2015	General Surgery	Henshall-Vader , Jon (Doctor)	Test change description	2	Scheduled		150426	2151239	
03 Jun 2016	General Surgery	Andrews , Davendra (Dr)	CYSTOMETROGRAPHY, NOT BEING A SERVICE ASSOCIATED W	3	Admitted		150731	2151699	01 May 2016
10 Feb 2016	General Surgery	Tauvae , Deborah (Prof)	INITIATION OF MANAGEMENT OF ANAESTHESIA FOR OPEN P	1	Discharged		150704	2151699	01 May 2016
04 Apr 2016	General Surgery	Tauvae , Deborah (Prof)	KELOID AND OTHER SKIN LESIONS, EXTENSIVE, MULTIPLE	1	Discharged		150710	2151699	01 May 2016
01 Aug 2016	General Surgery	Perry , cox (Dr)	OESOPHAGECTOMY WITH GASTRIC RECONSTRUCTION BY ABDO	5	Removed		150747	2152575	26 Aug 2016

Note: If a Waiting List Entry is removed the entry in error, it can be reinstated it by clicking the entry icon and following the steps below.

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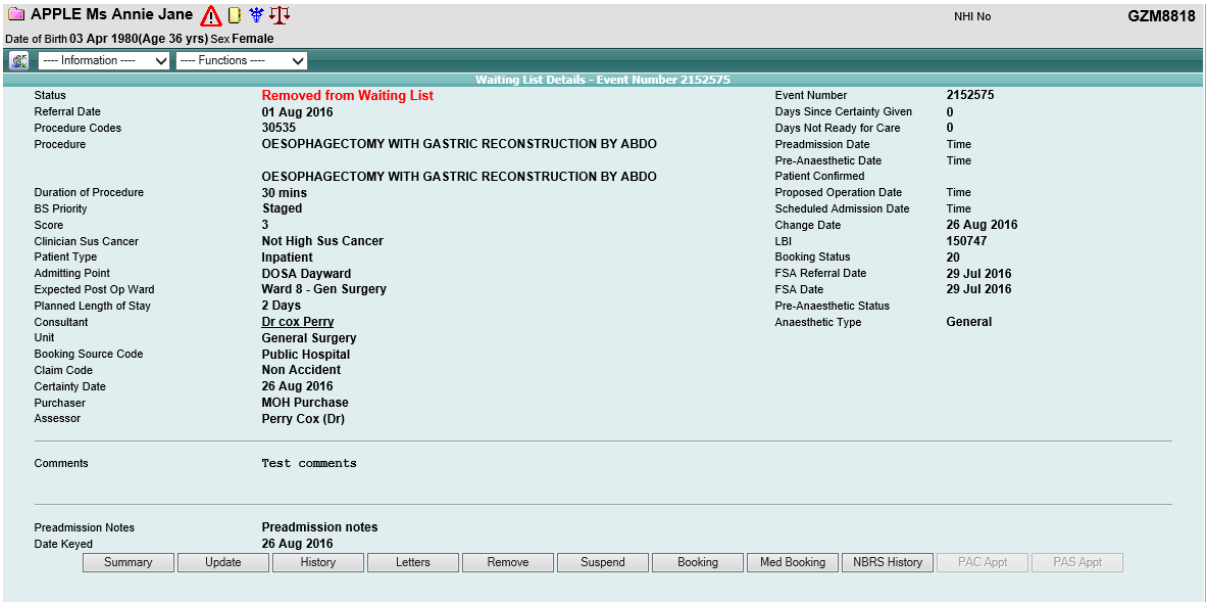
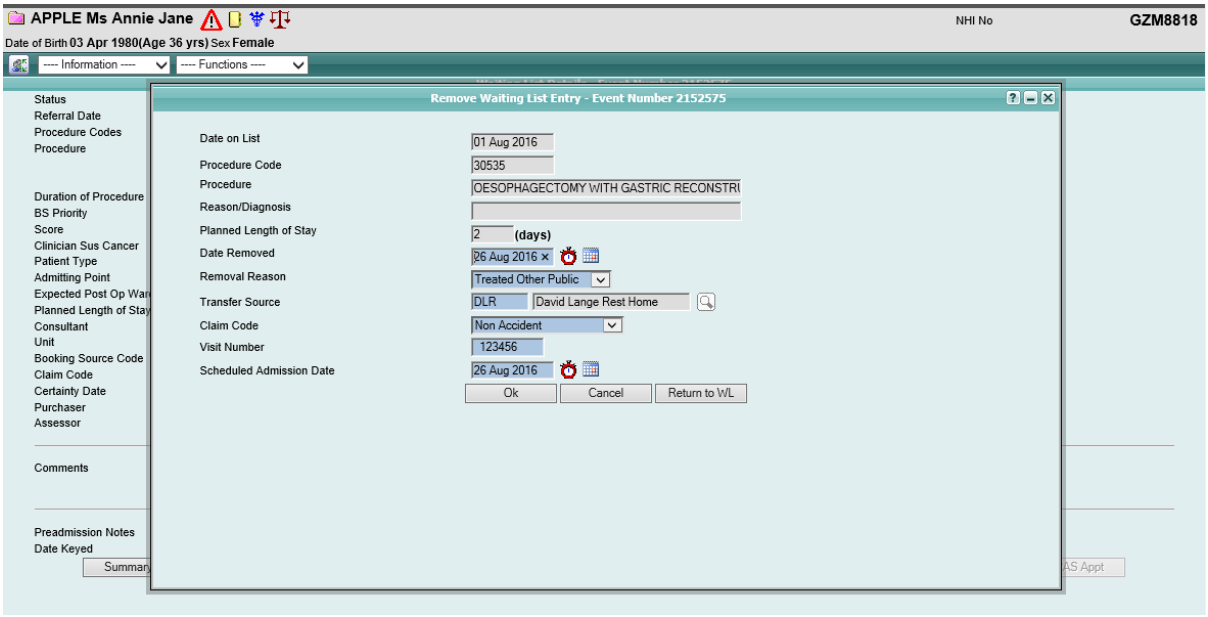
The following screen is displayed.

Note: The status is **Removed from Waiting List**.



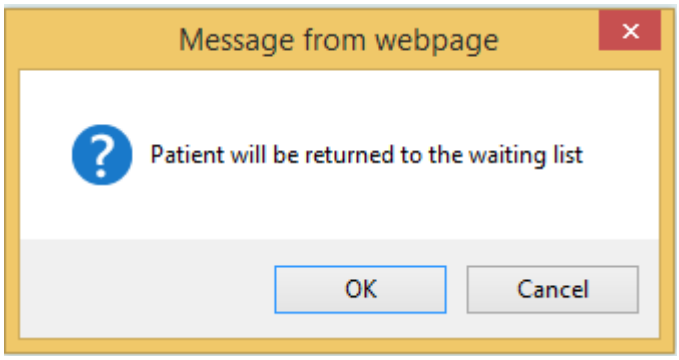
8. Click **Remove**.

The Remove Waiting List Entry screen will display.



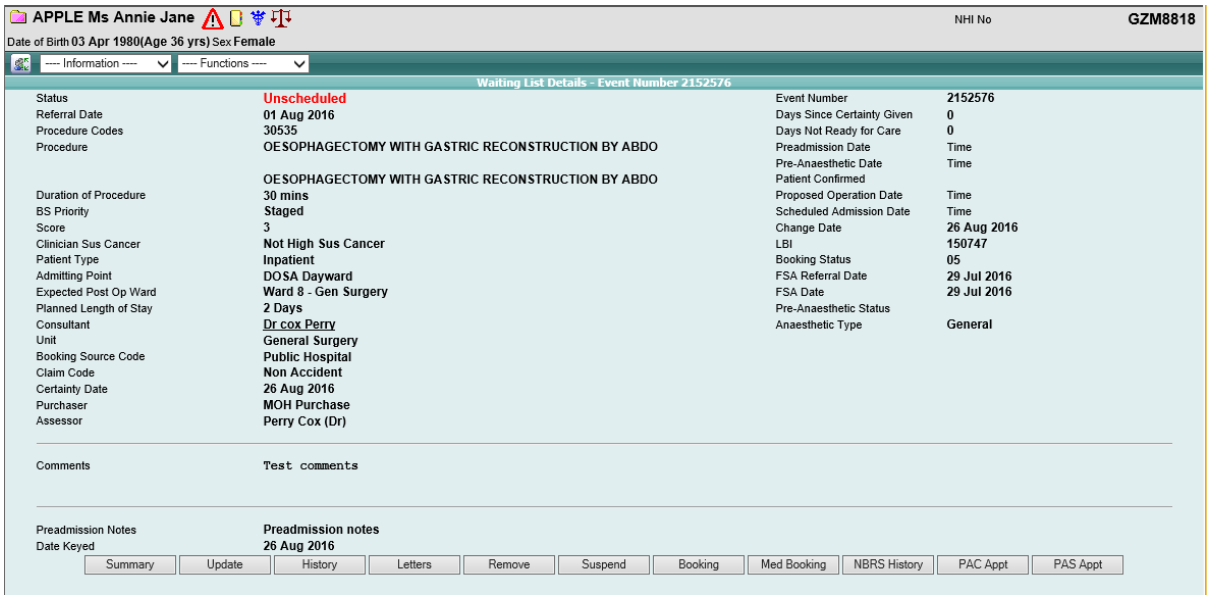
9. Click **Return to WL**.

The following message will display.



10. Click **Ok**.

The Waiting List Entry is reinstated on the Waiting List and the patient's Waiting List Details screen will display with a status of **Unscheduled**.



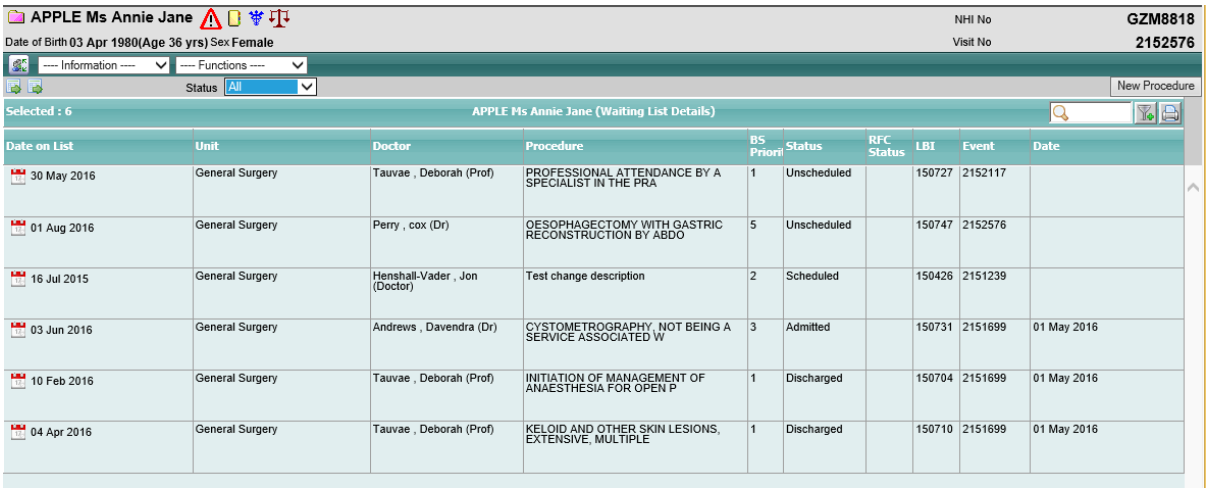
4.5 Suspending the Waiting List Entry

The Waiting List module enables users to suspend a Waiting List entry in the case of patient illness or unavailability.

1. Select the required patient.

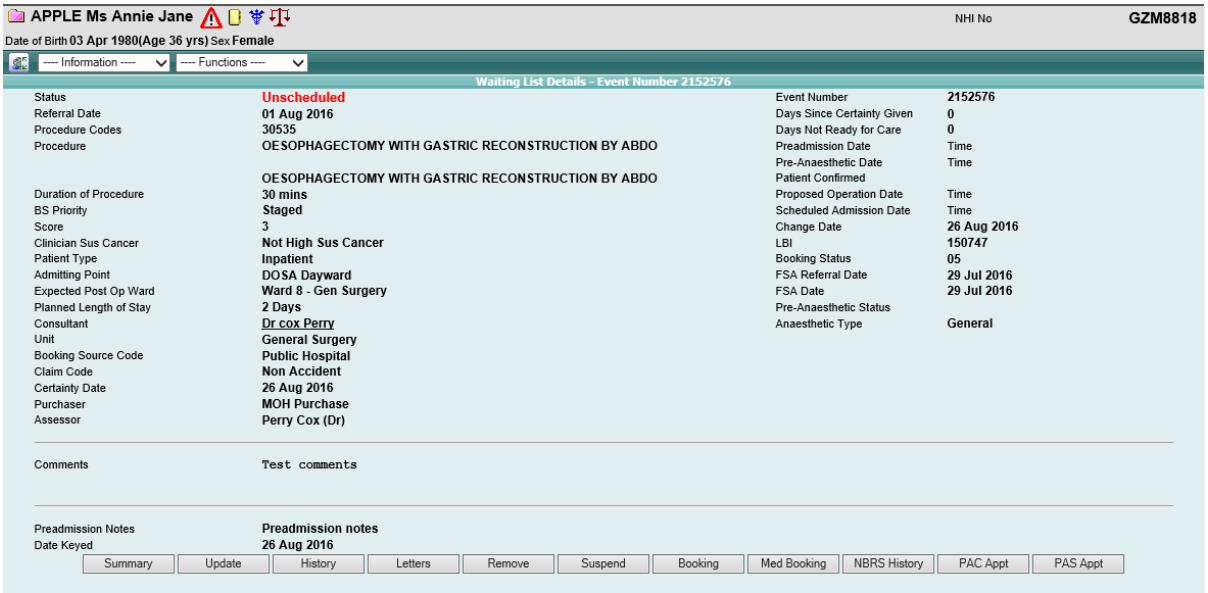
2. Select **Waiting List** from the appropriate patient level drop down list.

The Waiting List Details screen will display.



3. Click the calendar icon beside the required Waiting List entry.

The Waiting List Details screen will display.



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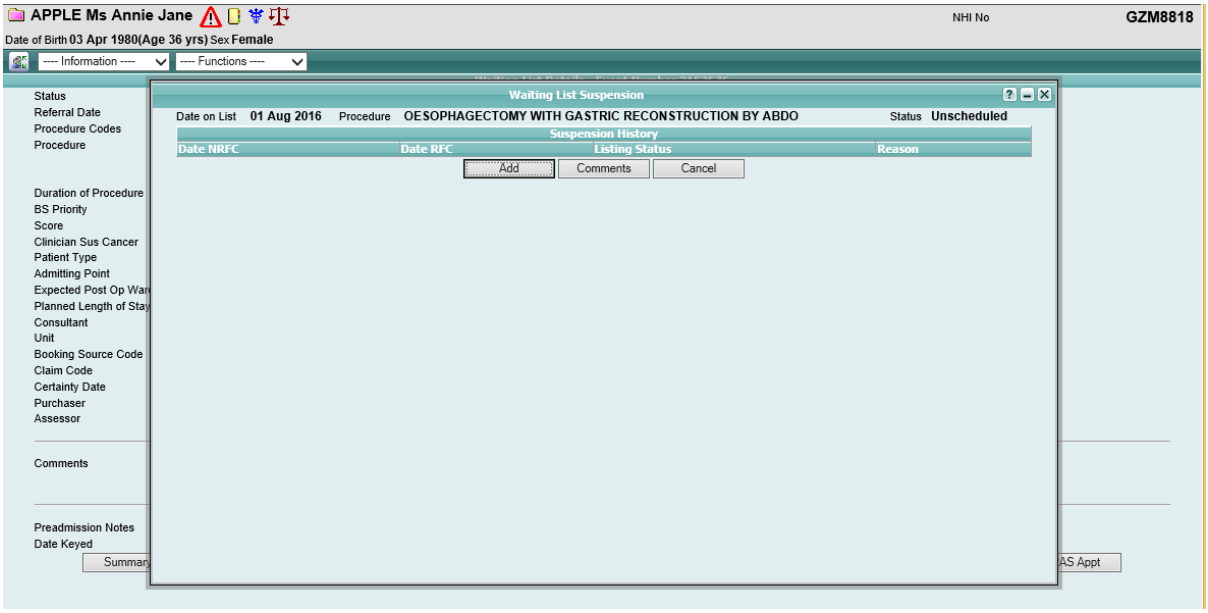
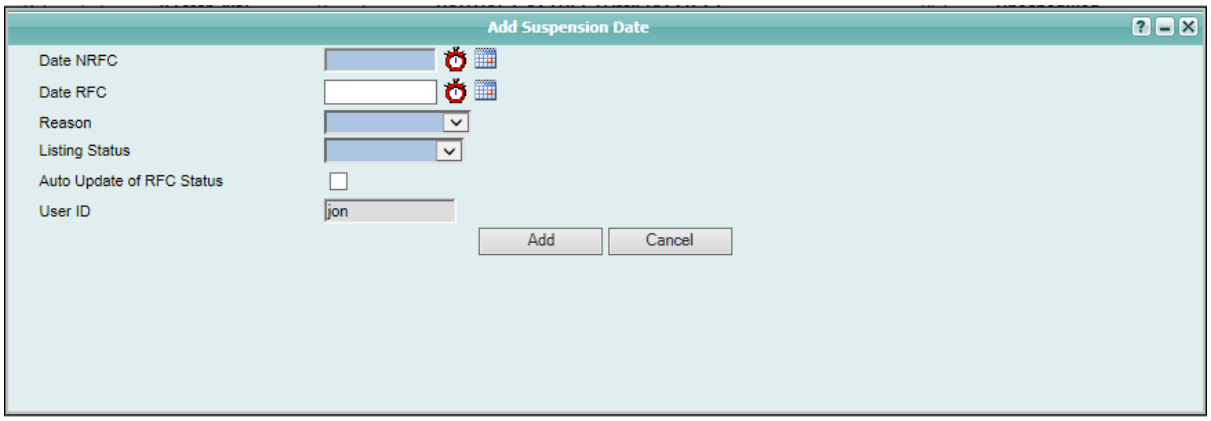
4. Click **Suspend**.

The Waiting List Suspension screen will display.



5. Click **Add**.

The Add Suspension Date screen will display.



6. Enter the details as required.

Field	Description
Date NRFC	Enter the start date for the suspension. The Waiting List module will stop counting Ready for Care days for this entry and start counting Not Ready for Care days once you add the suspend the entry.
Date RFC	Enter the last day of the suspension, if known, otherwise leave this field blank.

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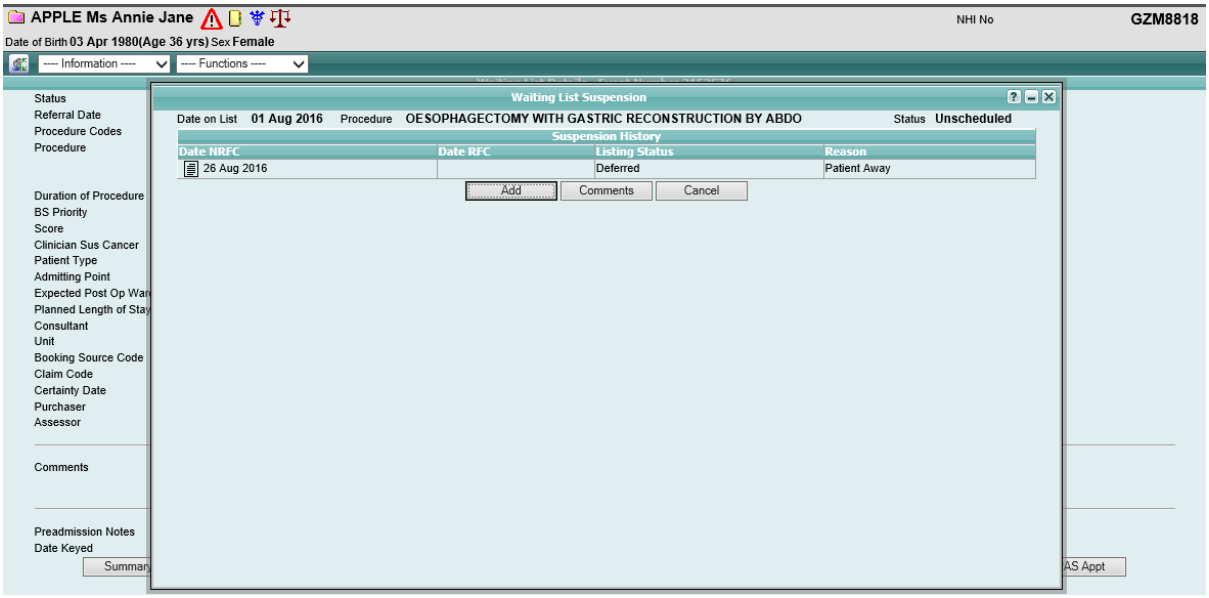
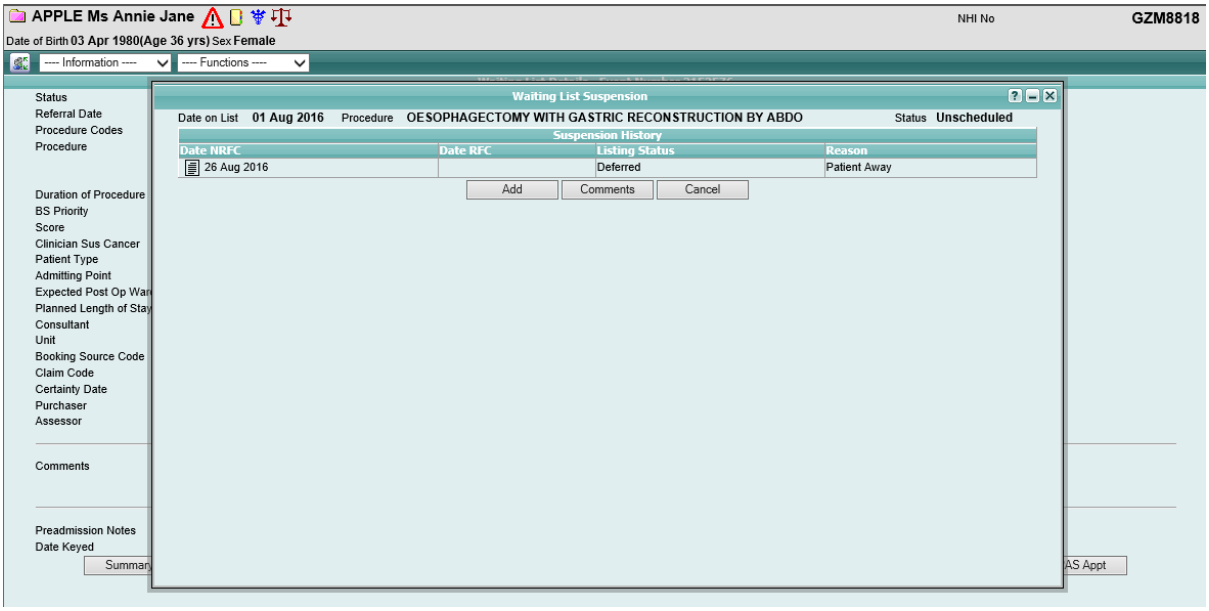
Field	Description
Reason	Select a reason from the list for example, Patient on Holidays.
Listing Status	Select a Ready for Care Status from the list if the defaulted status is not suitable.
Auto Update of RFC Status	Select this checkbox if you entered a date in the Date To field. The Waiting List module will automatically change the patient's status from Not Ready for Care to Ready for Care and count the days appropriately.
User ID	Displays the User ID of the user logged on. This field cannot be changed.

7. Click **Add**. The Waiting List Suspension screen displays:



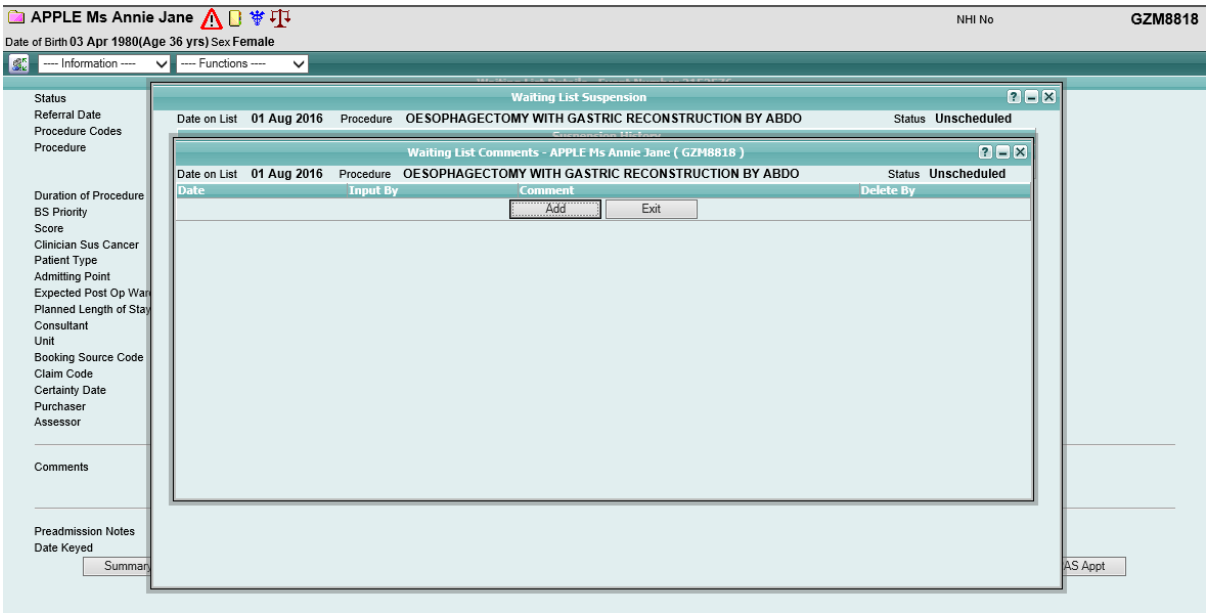
4.5.1 Adding Suspension Comments

1. Select the required patient.
2. Select **Waiting List** from the appropriate patient level drop down menu.
3. Click the calendar icon beside the required entry.
4. The Waiting List Details screen will display.
5. Click **Suspend**.
6. The Waiting List Suspension screen will display.



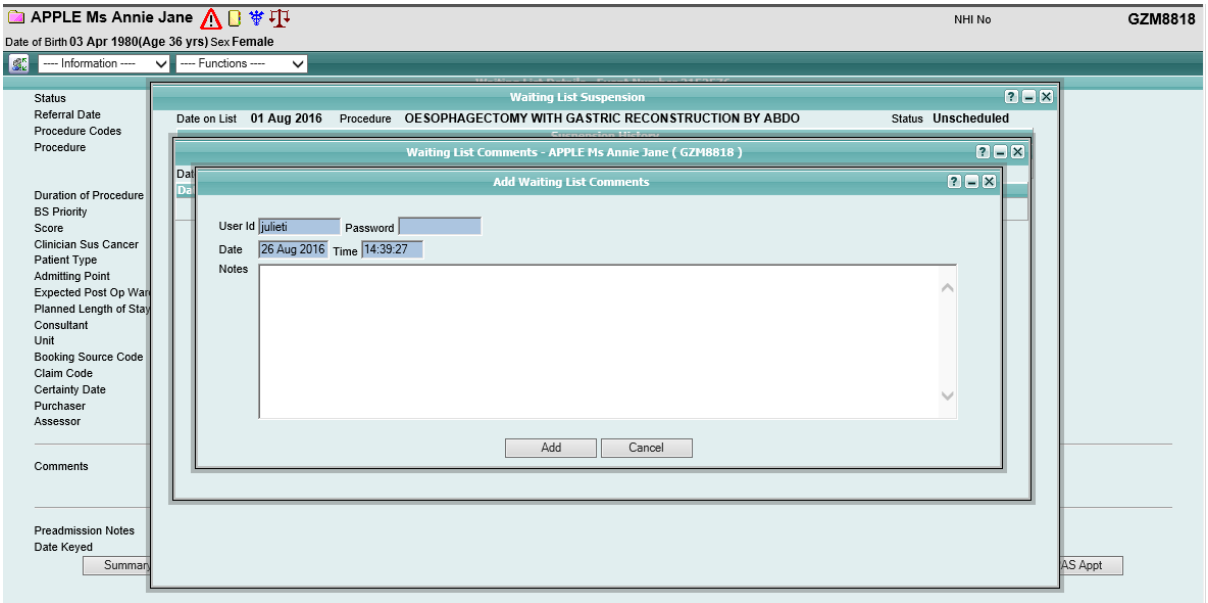
7. Click **Comments**.

The Waiting List Comments screen will display.



8. Click **Add**.

9. The Add Waiting List Comments screen will display.



10. Enter a valid User Id and Password combination. The User Id defaults to the user logged into the system.

The Date and Time fields will default to the current date and time.

11. Enter the text into the Notes field.

12. Click **Add**.

The Waiting List Comments screen will display.

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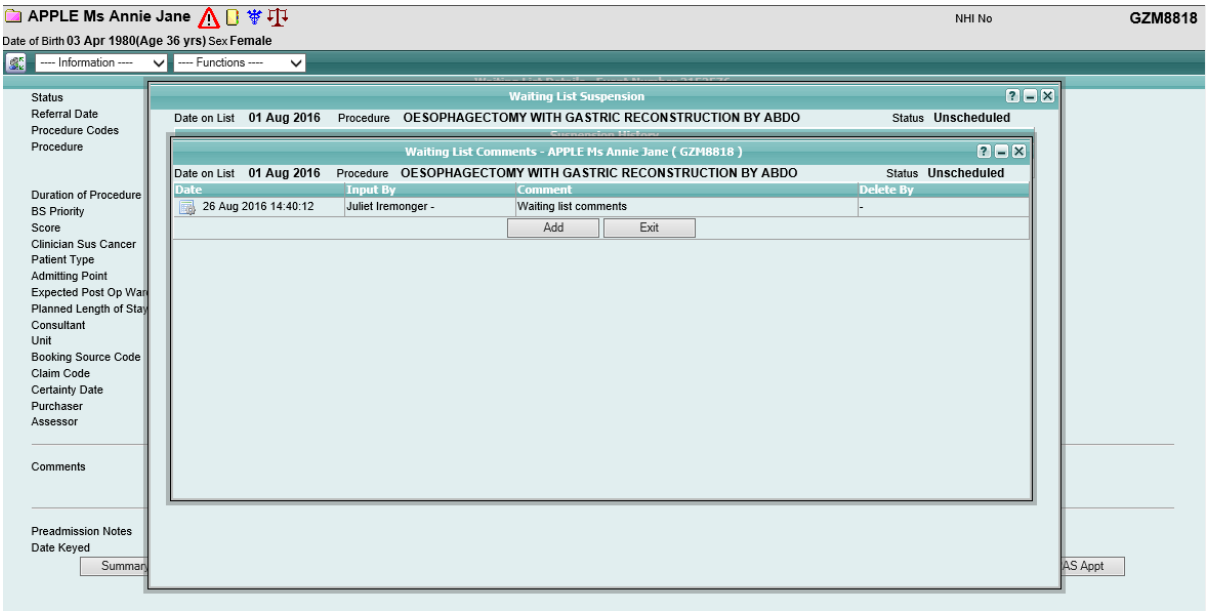


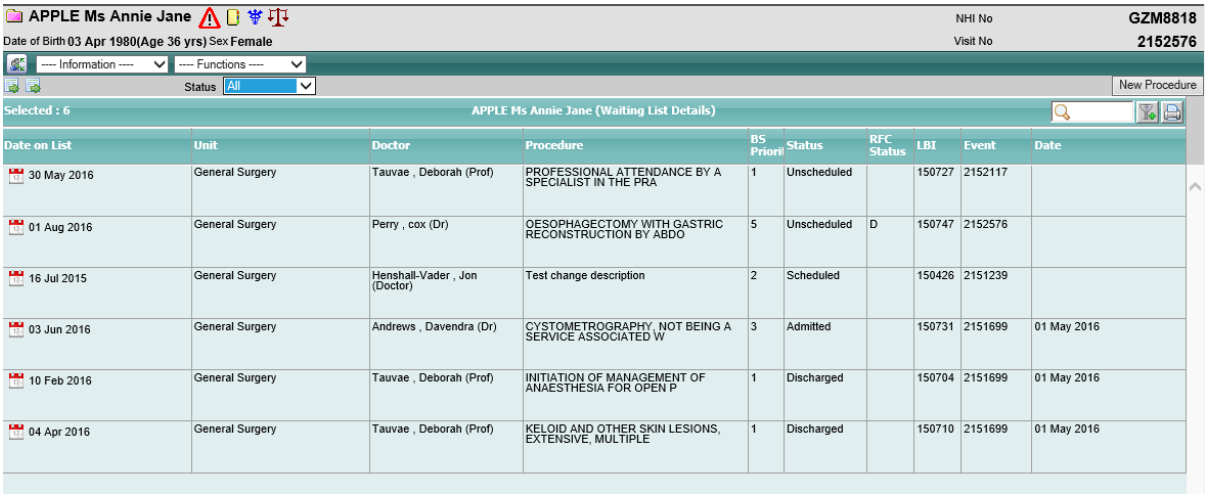
4.6 Make a Theatre Booking

Theatre bookings can be made via a patient's Waiting List entry.

1. Select the required patient.

2. Select **Waiting List** from the appropriate patient level drop down list.

The Waiting List Details screen will display.



3. Click the calendar icon beside the required Waiting List entry.

The Waiting List Details screen will display.

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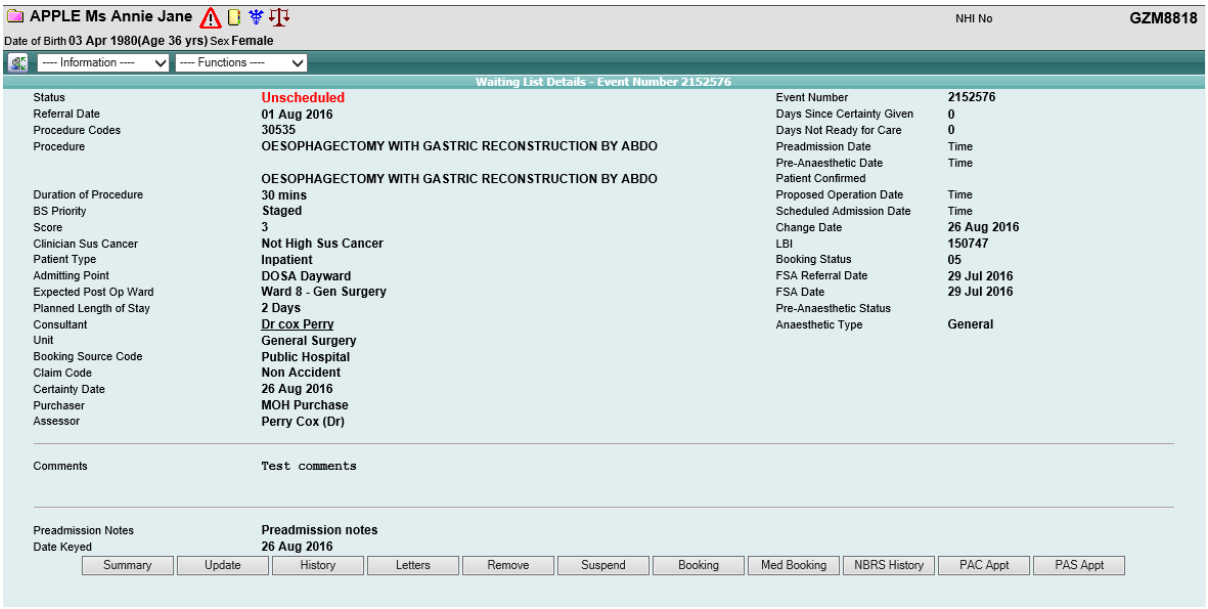
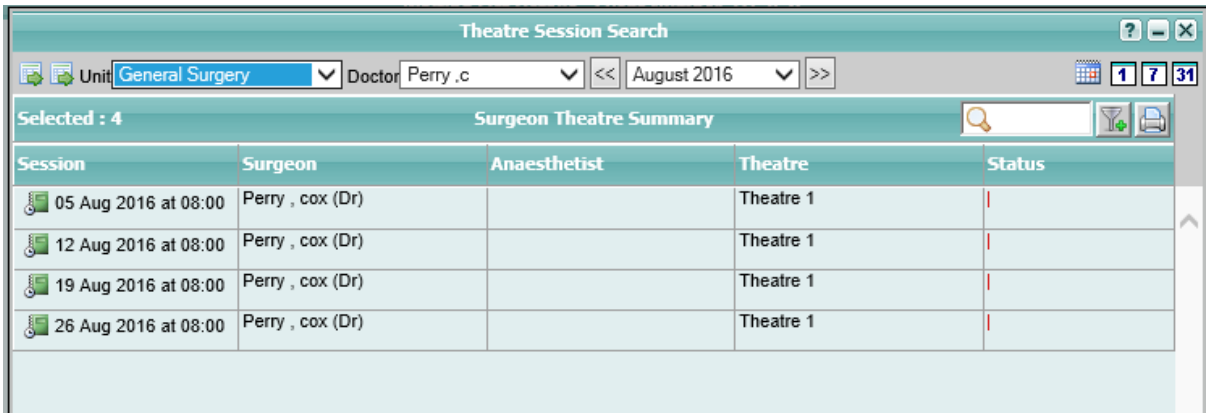


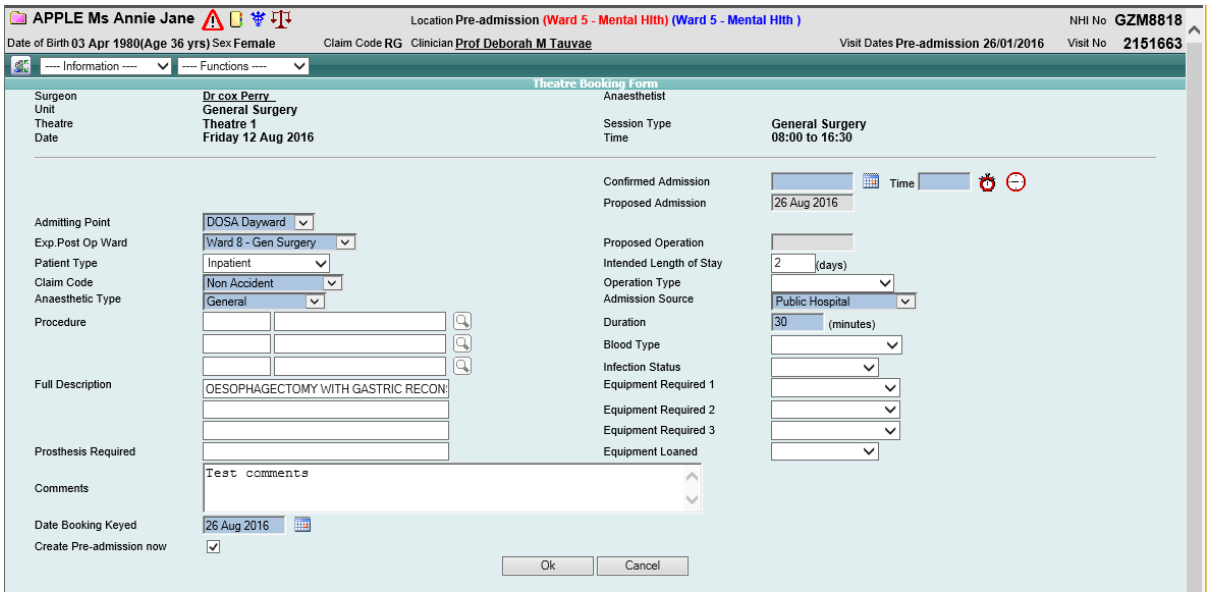
4. Click **Booking**.

The Theatre Session Search screen will display.



5. Click the **Theatre Session** icon beside the required session date and time.

The Theatre Booking Form will display.

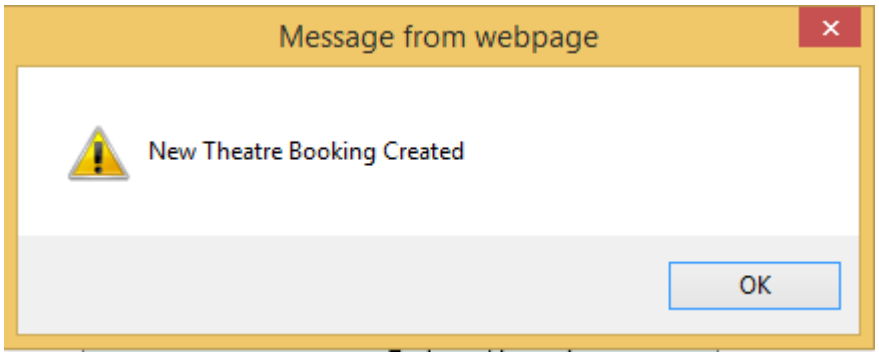


Note: Many fields will be auto populated from the Waiting List record.

6. Complete the remaining details required. Refer to the Theatre User Guide for details.

7. Click **Ok**.

The following message will display, confirming that the theatre booking has been created.



8. Click **OK**.

The Waiting List Details screen will display the Status as **Scheduled**.

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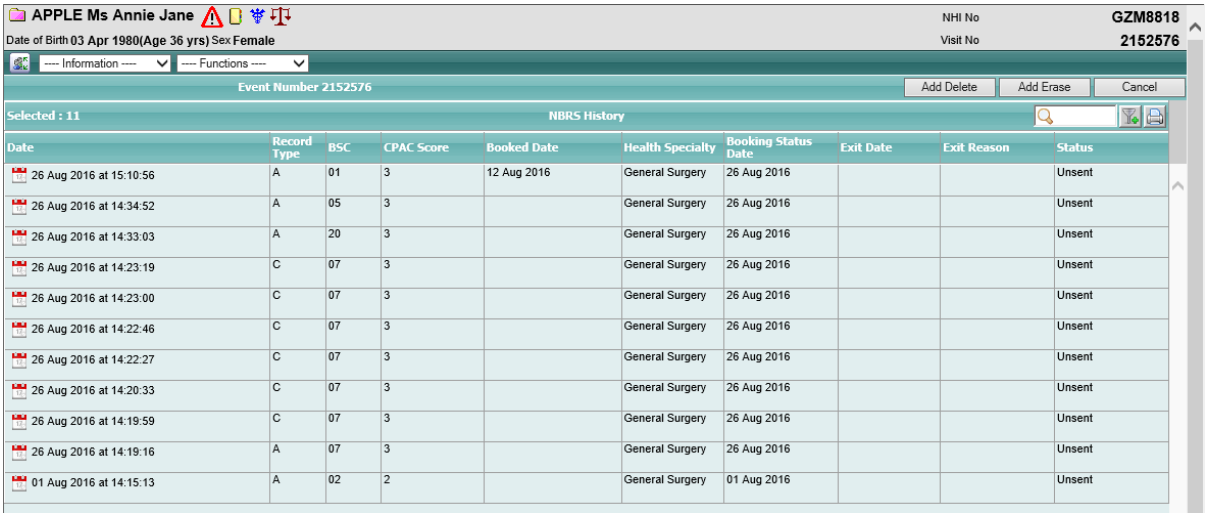
Note: Making a Booking will write an '01' NBRS record.



4.7 Make a Medical Booking

Medical Bookings can only be made for patients with a Waiting List status of **Unscheduled**, as a patient can only have either a Medical Booking **or** a Theatre Booking associated with their Waiting List entry.

1. Select the required patient.

2. Select **Waiting List** from the appropriate patient level drop down list.

The Waiting List Details screen will display.

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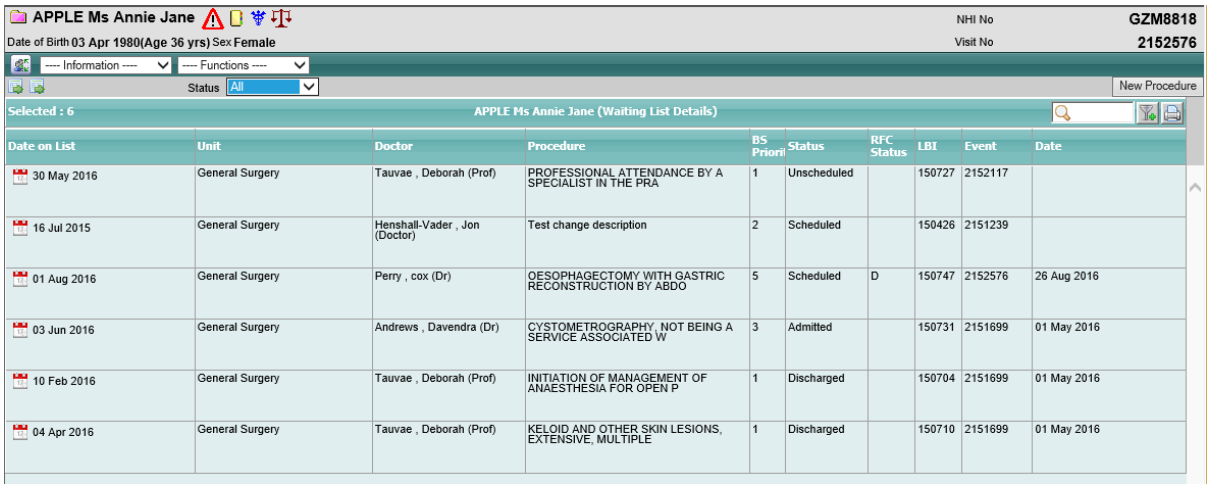
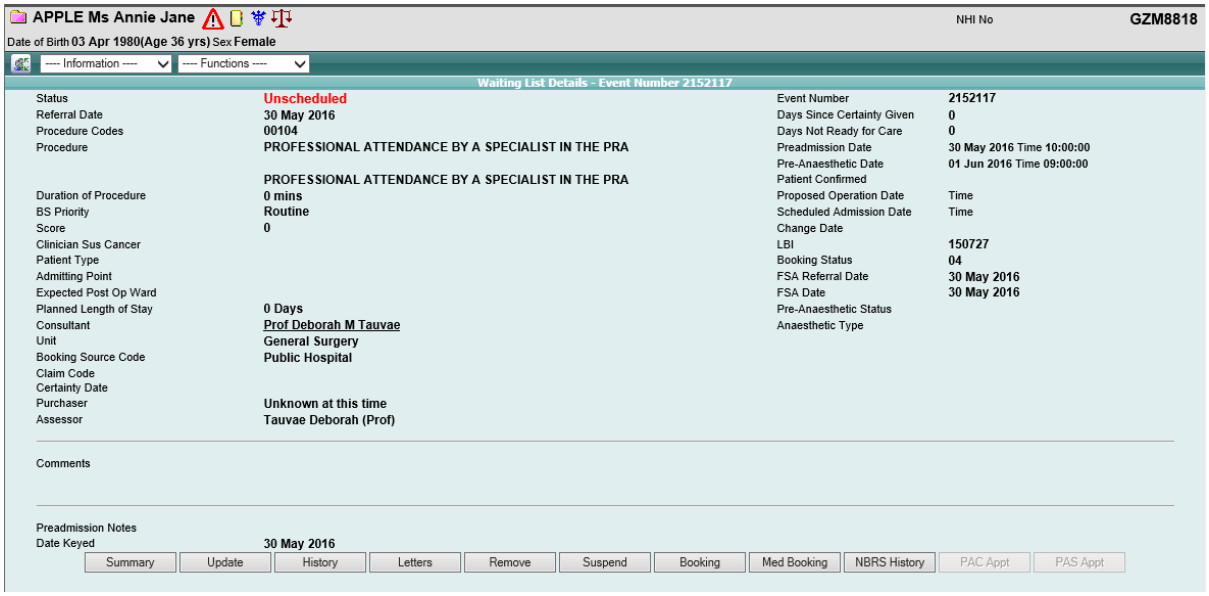


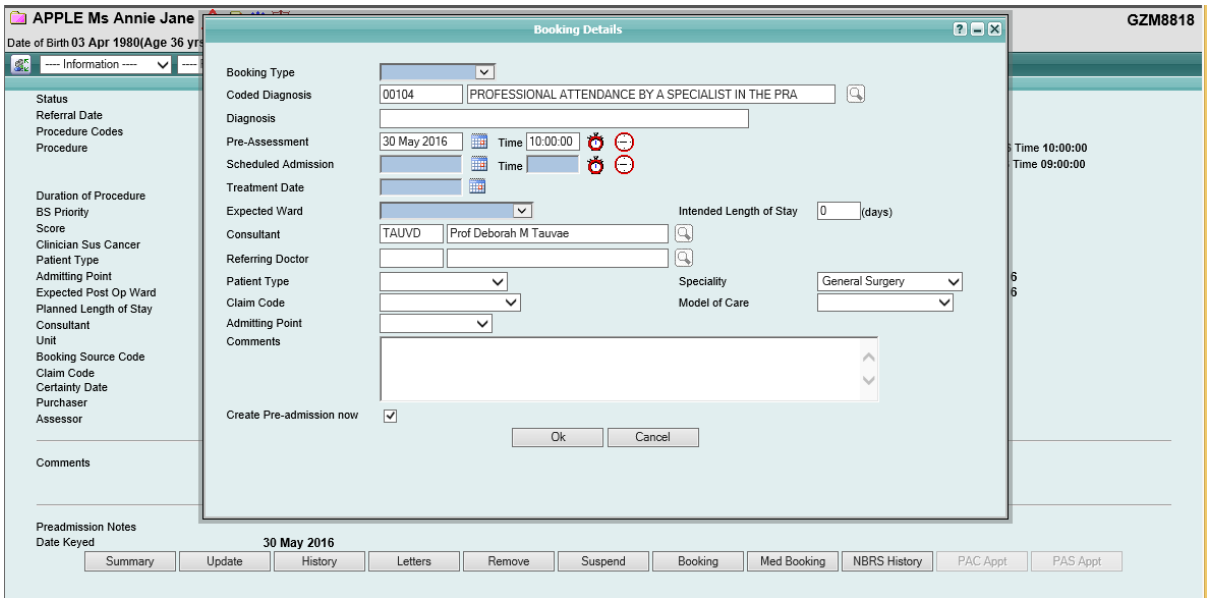
3. Click the calendar icon beside the required Waiting List entry.

The Waiting List Details screen will display.



4. Click **Med Booking**.

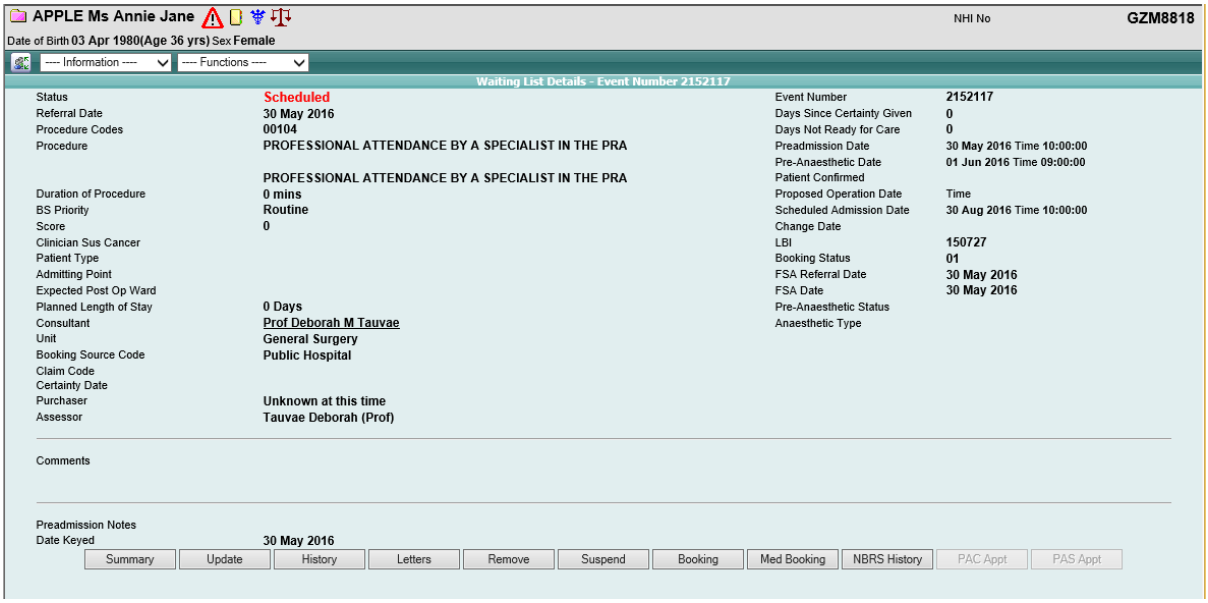
The following screen will display.



Note: Many fields will be auto populated from the Waiting List record.

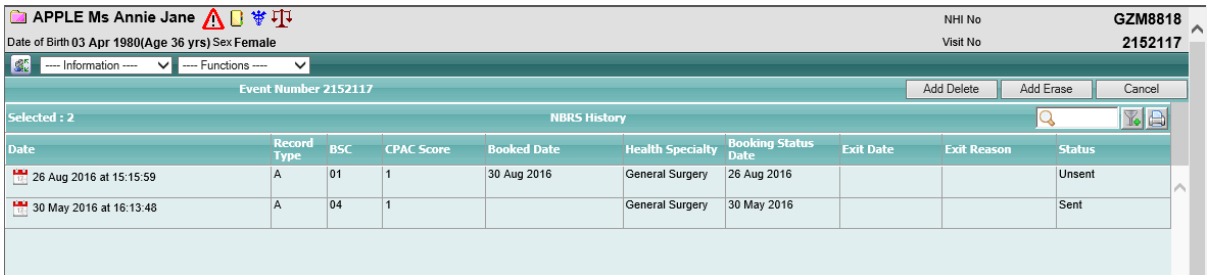
5. Select a value from the Booking Type drop down list.
6. Complete the remaining details required.
7. Enter a **Scheduled Admission Date** and **Time**.
8. Enter a **Treatment Date**.
9. Select an **Expected Ward** from the drop down list.
10. Click **Ok**.

The Waiting List Details screen will display the Status as **Scheduled**.



Note: Users can update the fields by navigating to the Waiting List Details screen for the required patient and clicking **Med Booking** again.

Note: Making a Booking will write an '01' NBRS record.



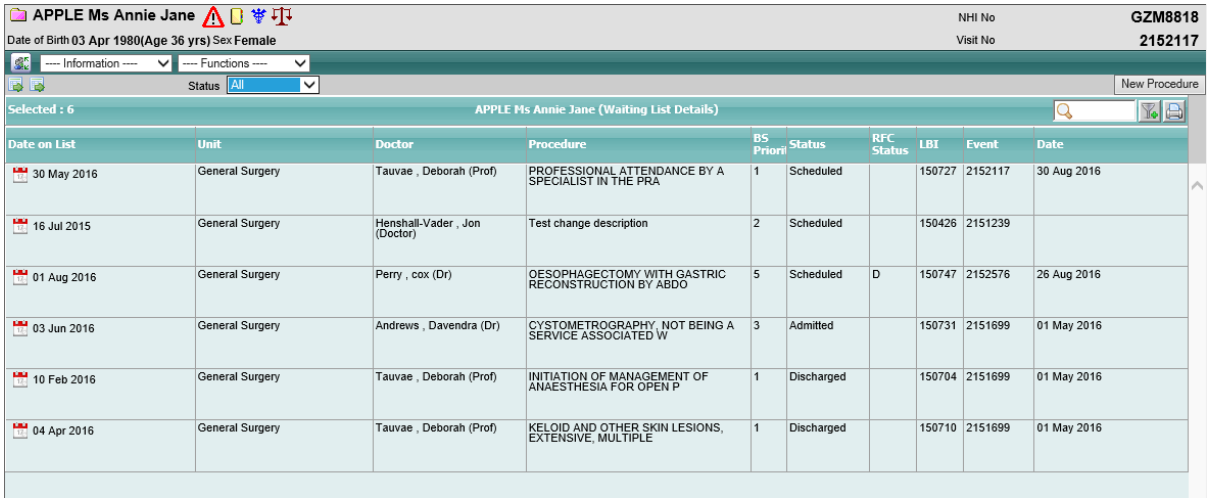
4.8 NBRS History

The Waiting List system will generate the required NBRS records for extraction and submission to the Ministry of Health.

1. Select the required patient.

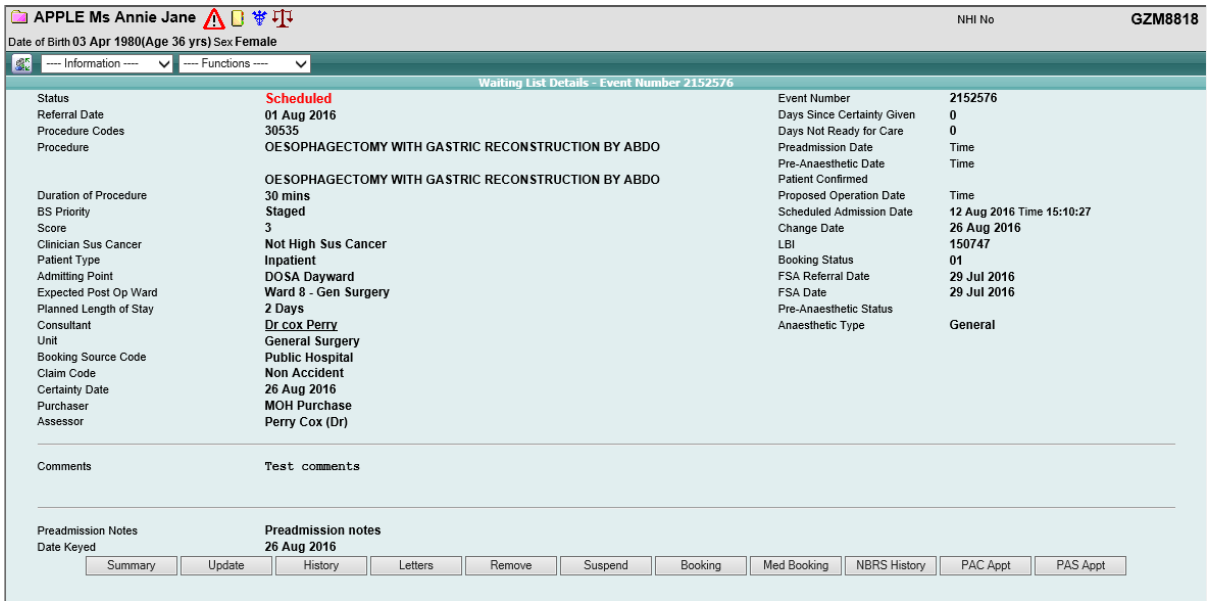
2. Select **Waiting List** from the appropriate patient level drop down list.

The Waiting List Details screen will display.



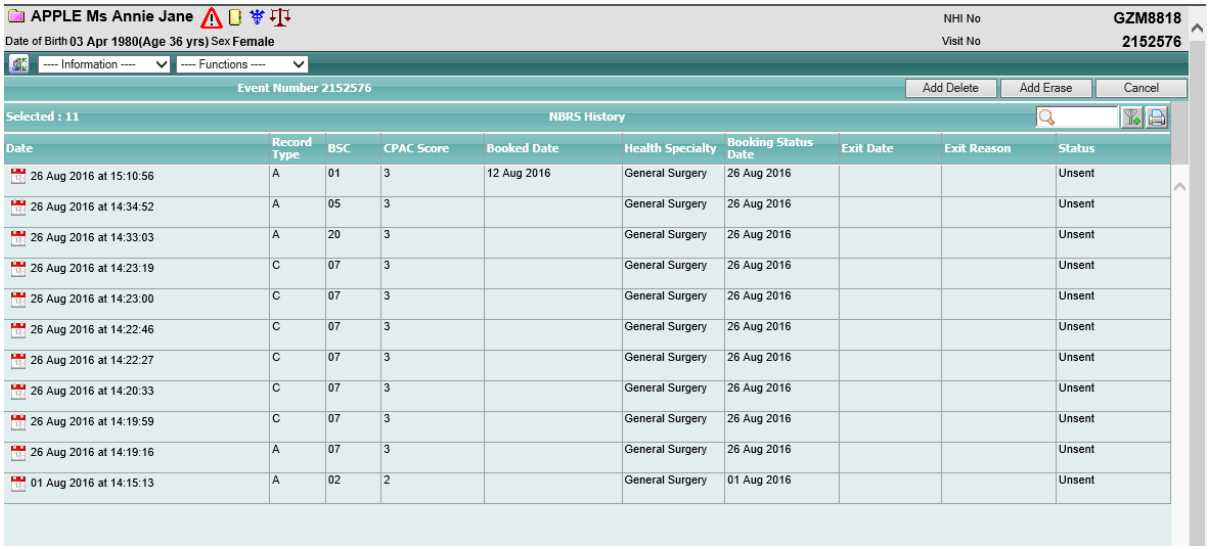
3. Click the calendar icon beside the required Waiting List entry.

The Waiting List Details screen will display.



4. Click **NBRS History**.

The following screen will display.



5. Click the calendar icon beside the required NBRS entry.

The following screen will display.

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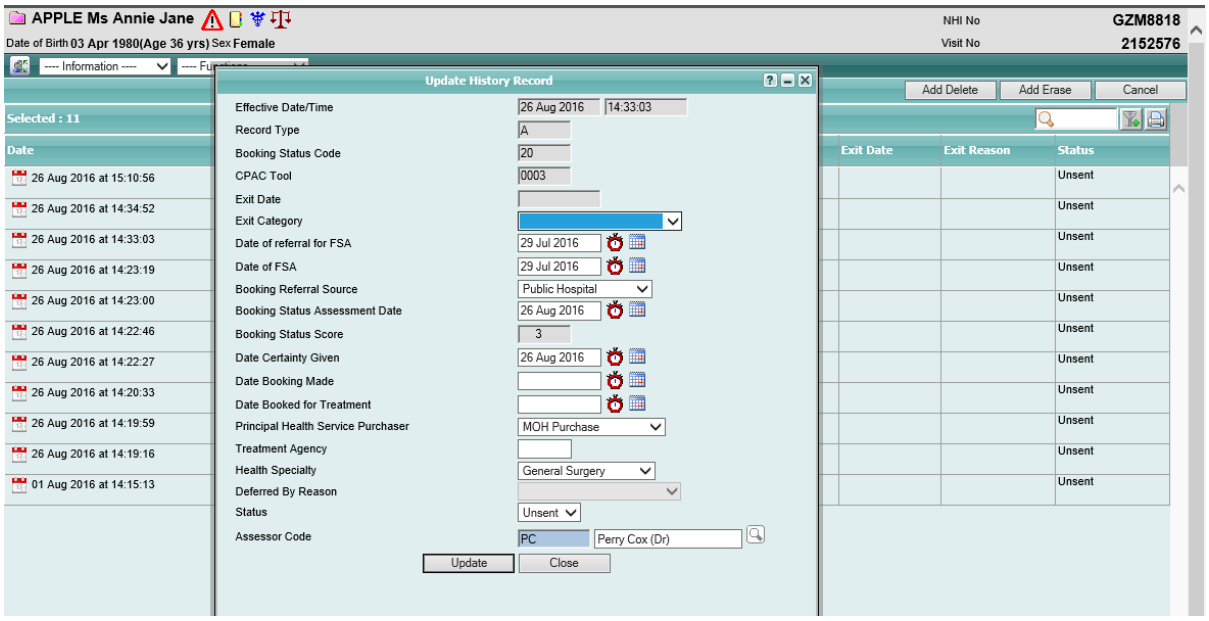
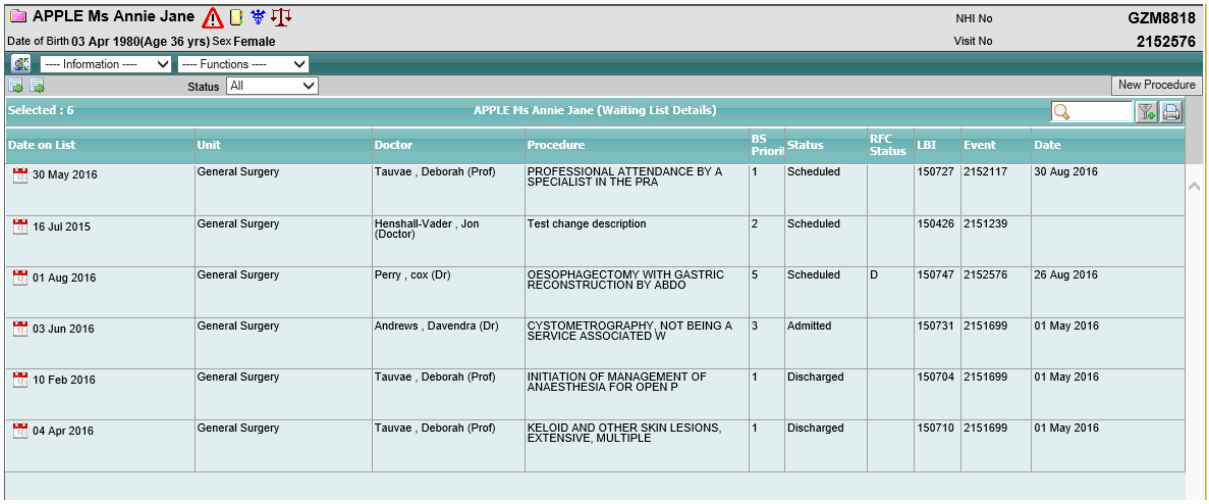


6. Make the required changes and click **Update.**

4.8.1 Adding Delete and Erase NBRS Records

1. Select the required patient.
2. Select **Waiting List** from the appropriate patient level drop down list.

The Waiting List Details screen will display.



3. Click the calendar icon beside the required Waiting List entry.

The Waiting List Details screen will display.

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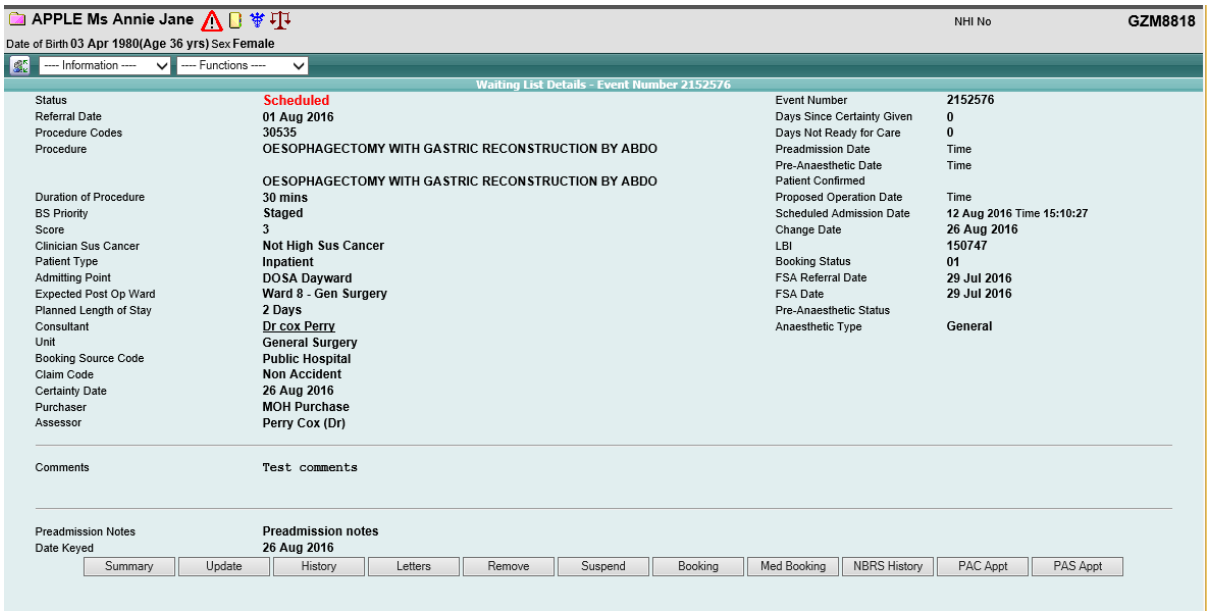
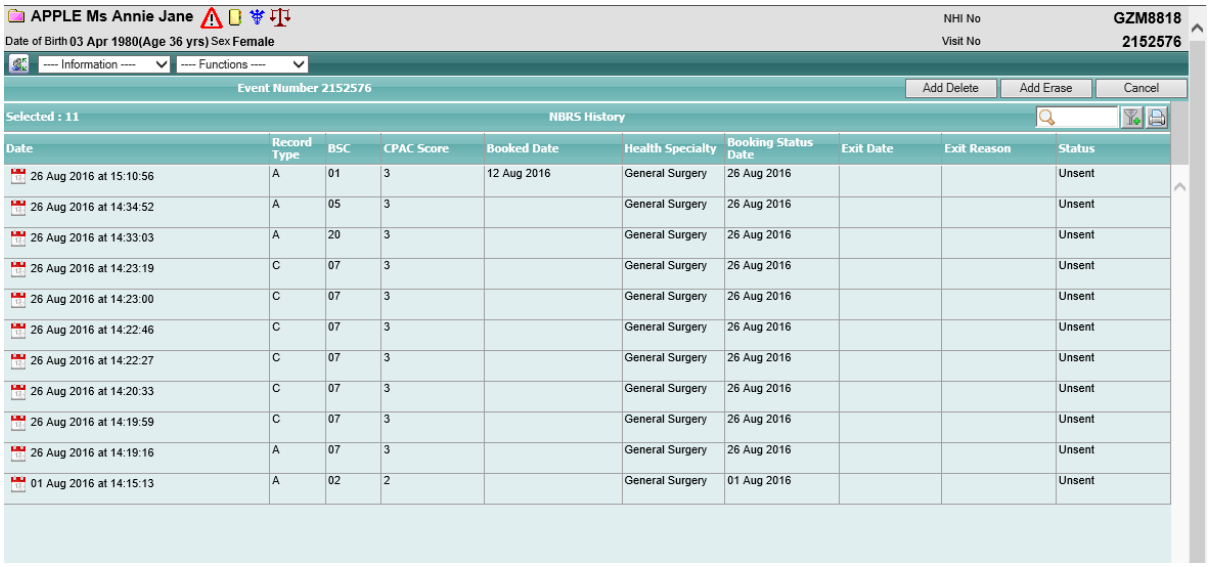


4. Click **NBRS History**.

The following screen will display.



5. Click the **Add Delete** button to add a Delete record.

The following message will display, confirming that the last Booking Status record is to be Deleted. This will send an ‘D’ record in the NBRS Extract.

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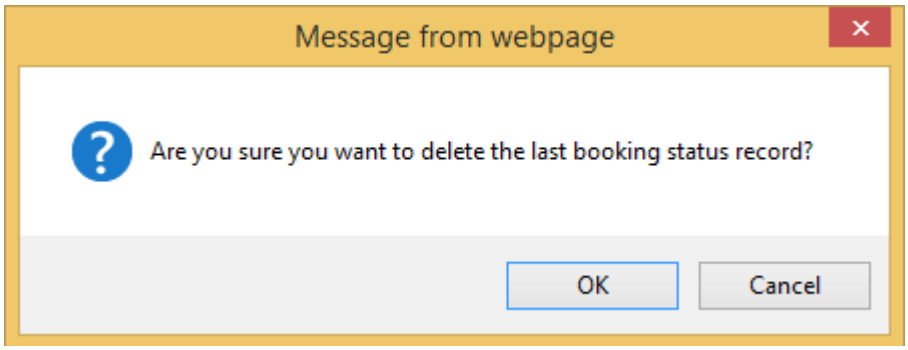
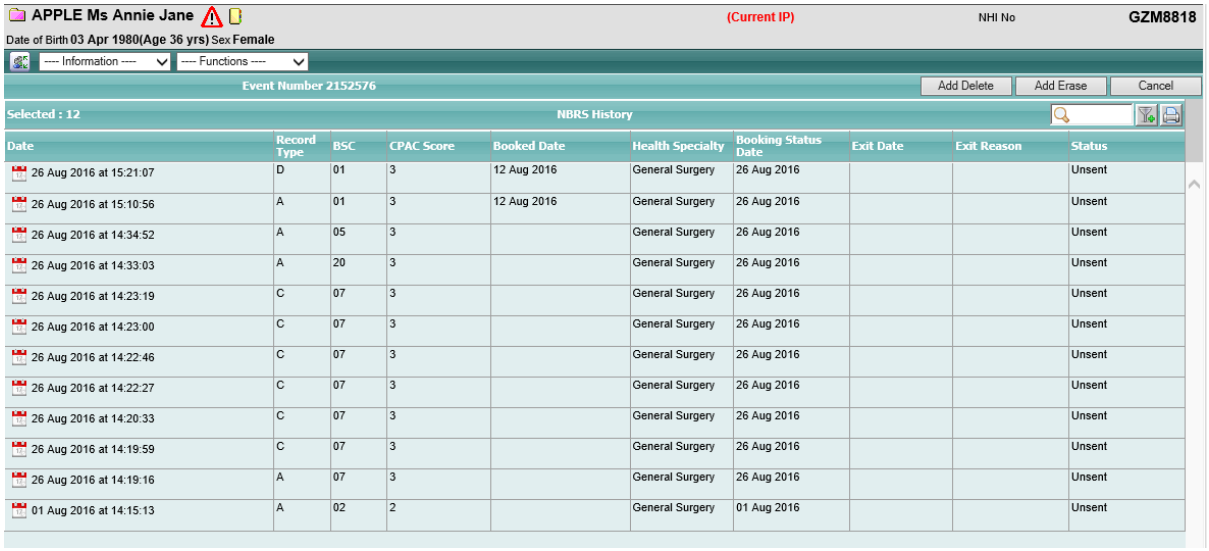


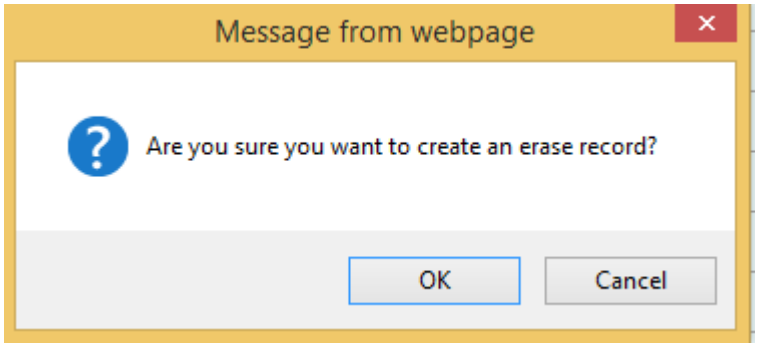
The **NBRS Delete** record will display on the NBRS History view.



Date	Record Type	BSC	CPAC Score	Booked Date	Health Specialty	Booking Status Date	Exit Date	Exit Reason	Status
26 Aug 2016 at 15:21:07	D	01	3	12 Aug 2016	General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 15:10:56	A	01	3	12 Aug 2016	General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:34:52	A	05	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:33:03	A	20	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:23:19	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:23:00	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:22:46	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:22:27	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:20:33	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:19:59	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:19:16	A	07	3		General Surgery	26 Aug 2016			Unsent
01 Aug 2016 at 14:15:13	A	02	2		General Surgery	01 Aug 2016			Unsent

6. Click the **Add Erase** button to add an Erase record.

The following message will display, confirming that the last Booking Status record is to be Erased. This will send an ‘E’ record in the NBRS Extract.



The **NBRS Erase** record will display on the NBRS History view.

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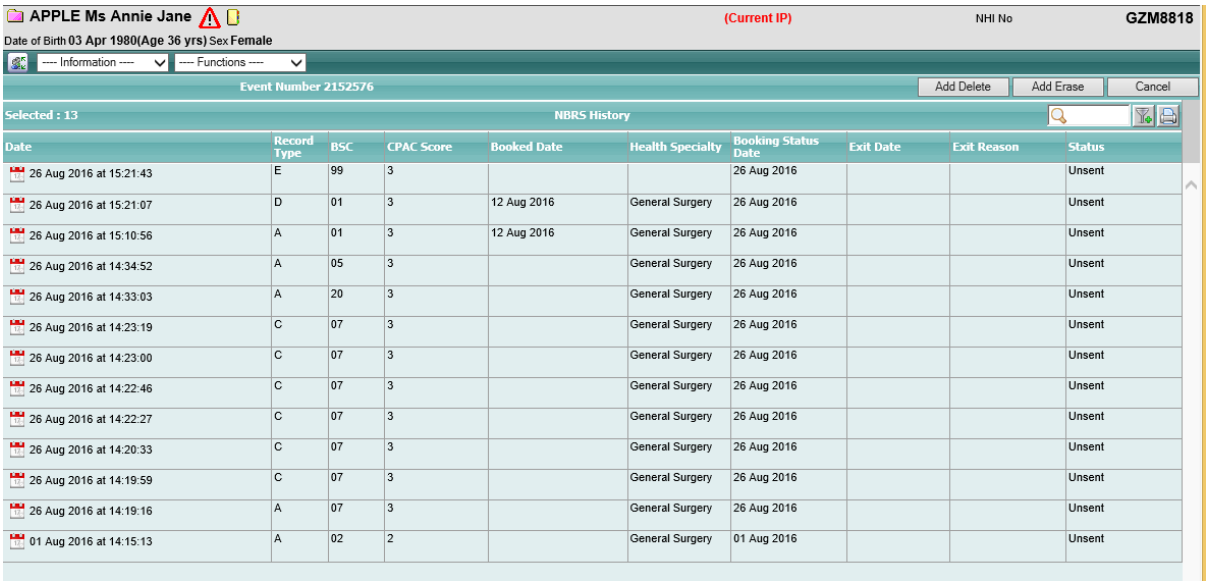


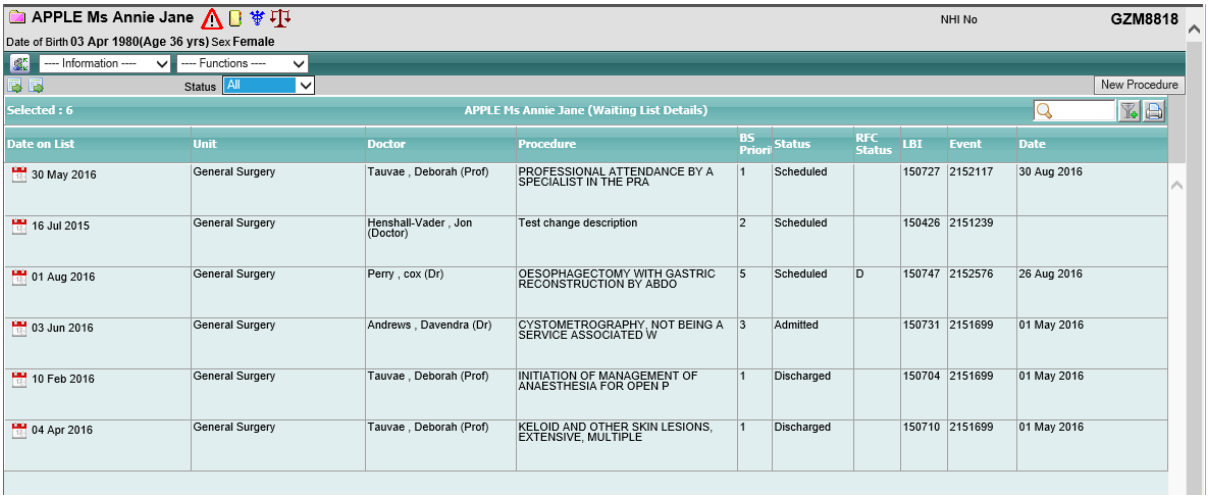
4.8.2 Resubmitting NBRS Records

If a record has already been Submitted to NBRS and any correction needs to be made and the record Resubmitted, this can be done by changing the Status of the record from Sent to Unsent.

1. Select the required patient.

2. Select **Waiting List** from the appropriate patient level drop down list.

The Waiting List Details screen will display.



3. Click the calendar icon beside the required Waiting List entry.

The Waiting List Details screen will display.

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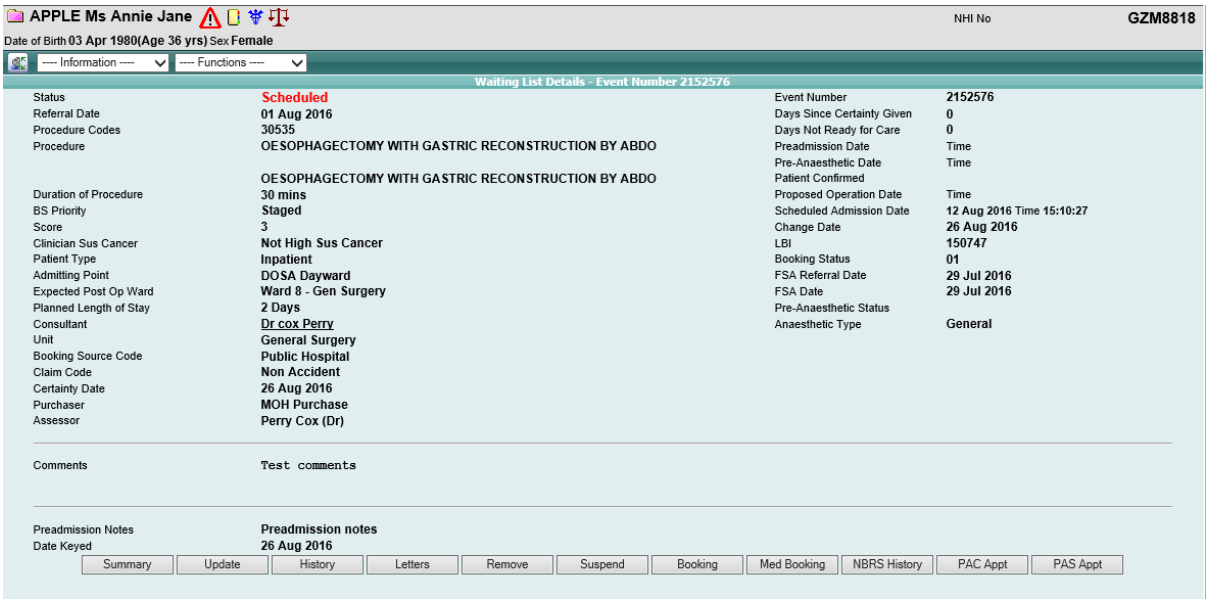
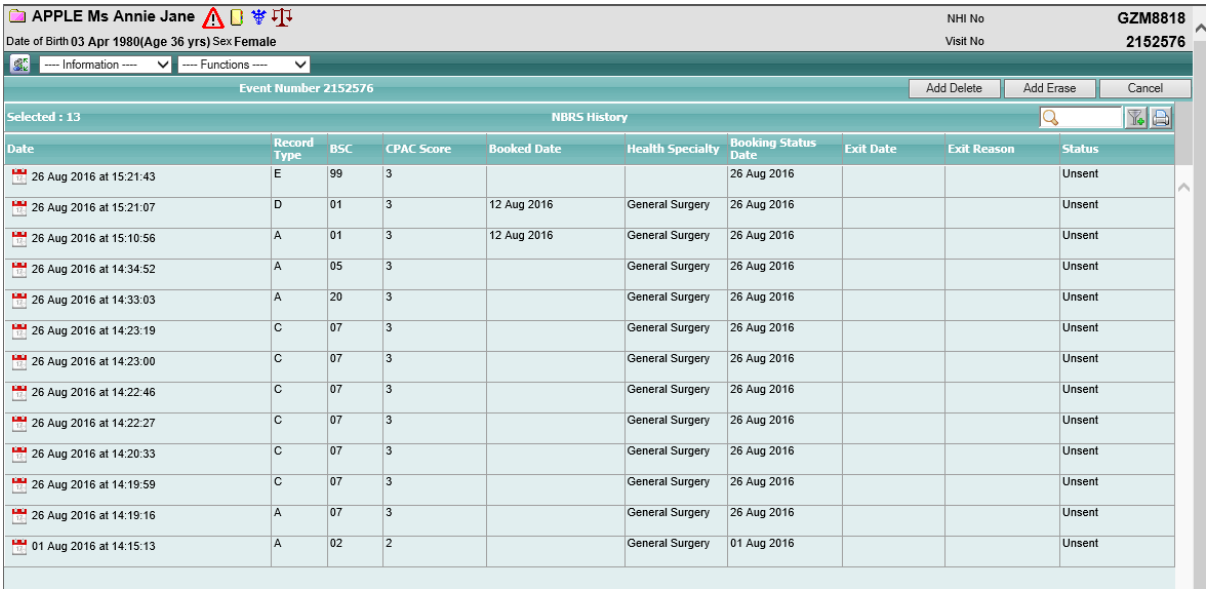


4. Click **NBRS History**.

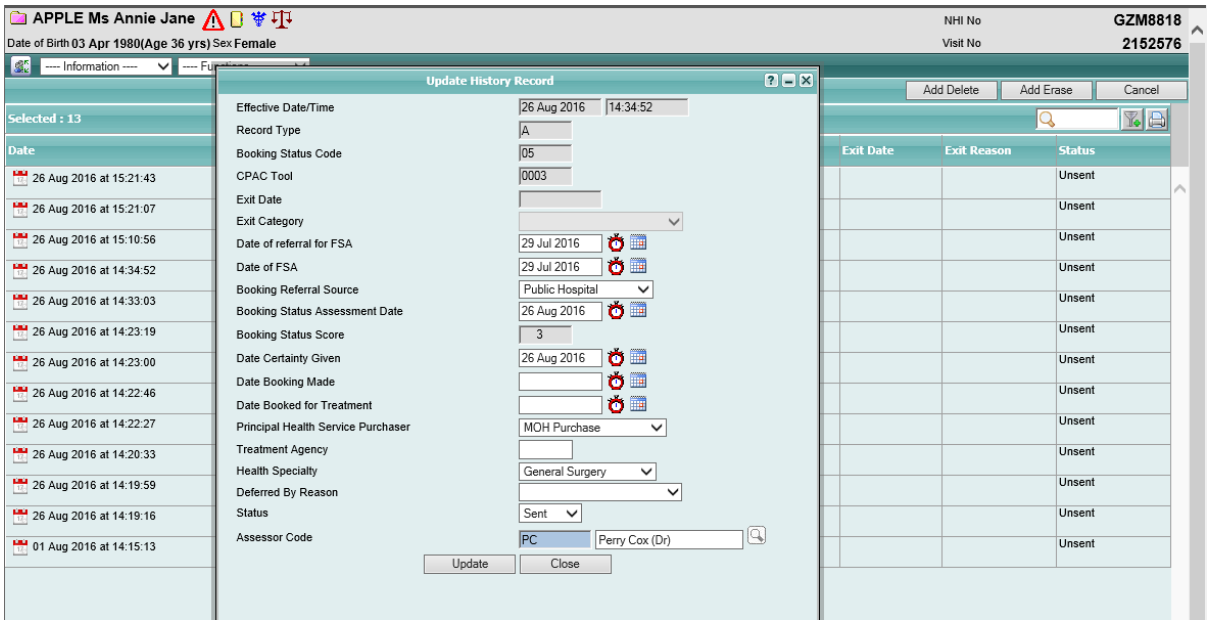
The following screen will display. The Status column shows the records that have been **Sent** to NBRS and those that are still **Unsent**.



Date	Record Type	BSC	CPAC Score	Booked Date	Health Specialty	Booking Status Date	Exit Date	Exit Reason	Status
26 Aug 2016 at 15:21:43	E	99	3			26 Aug 2016			Unsent
26 Aug 2016 at 15:21:07	D	01	3	12 Aug 2016	General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 15:10:56	A	01	3	12 Aug 2016	General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:34:52	A	05	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:33:03	A	20	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:23:19	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:23:00	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:22:46	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:22:27	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:20:33	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:19:59	C	07	3		General Surgery	26 Aug 2016			Unsent
26 Aug 2016 at 14:19:16	A	07	3		General Surgery	26 Aug 2016			Unsent
01 Aug 2016 at 14:15:13	A	02	2		General Surgery	01 Aug 2016			Unsent

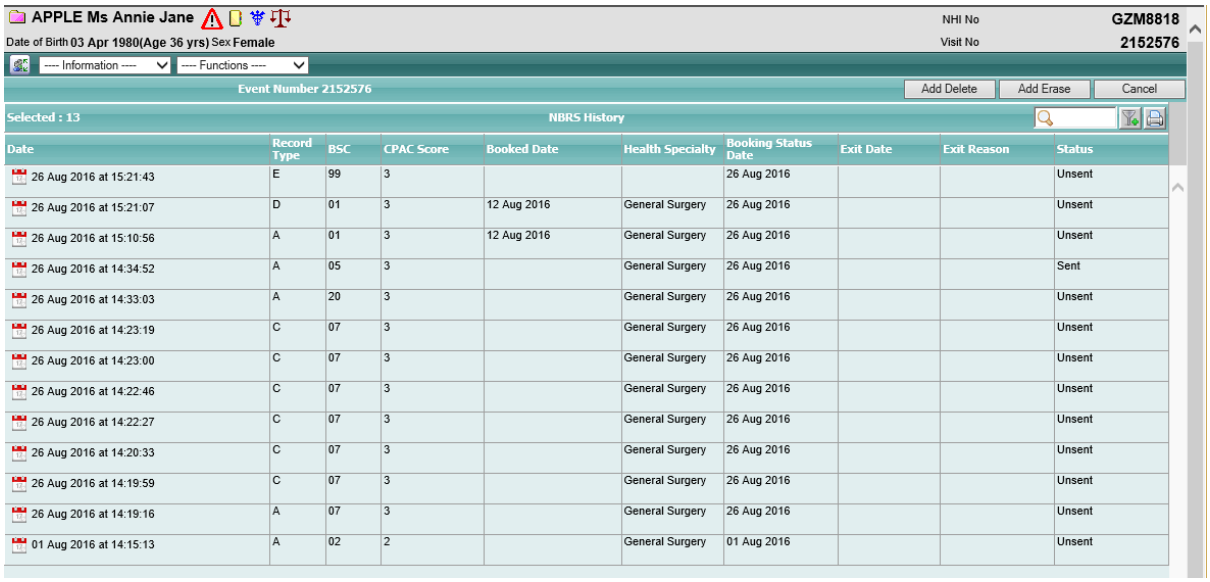
5. Click the calendar icon beside the required NBRS entry.

The following screen will display.



6. Change the Status field from **Sent** to **Unsent** and click **Update.**

The record will then appear in the list with a **Status** of **Unsent**.



4.9 Book an Appointment in an Outpatient Clinic

Prior to a patient's admission for a theatre booking, you can book Pre-admission and Pre-anaesthetic outpatient appointments for a pre-surgery assessments.

1. Select the required patient.

2. Select **Waiting List** from the appropriate patient level drop down list.

The Waiting List Details screen will display.

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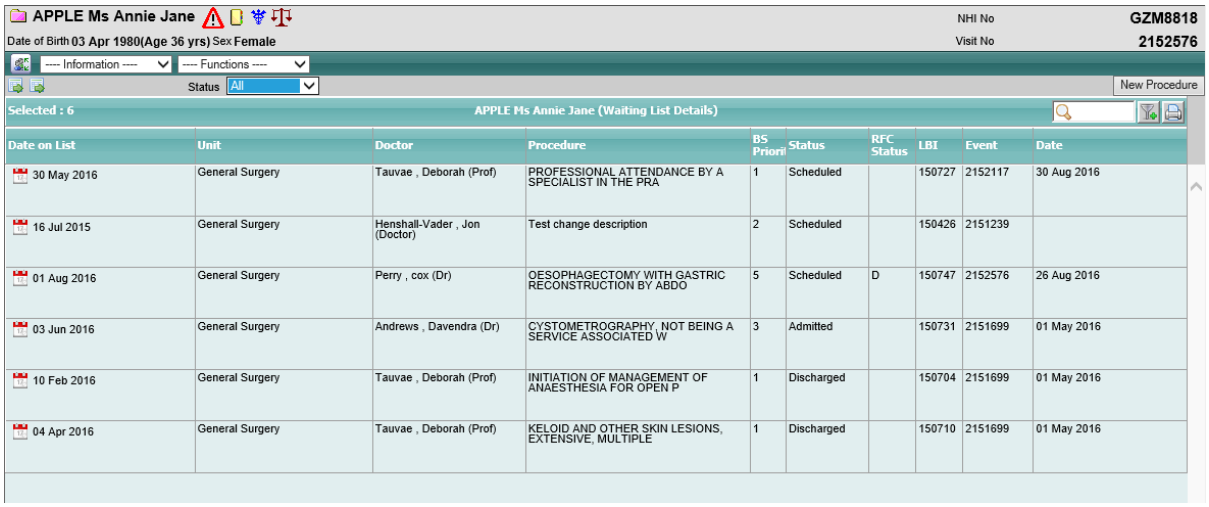
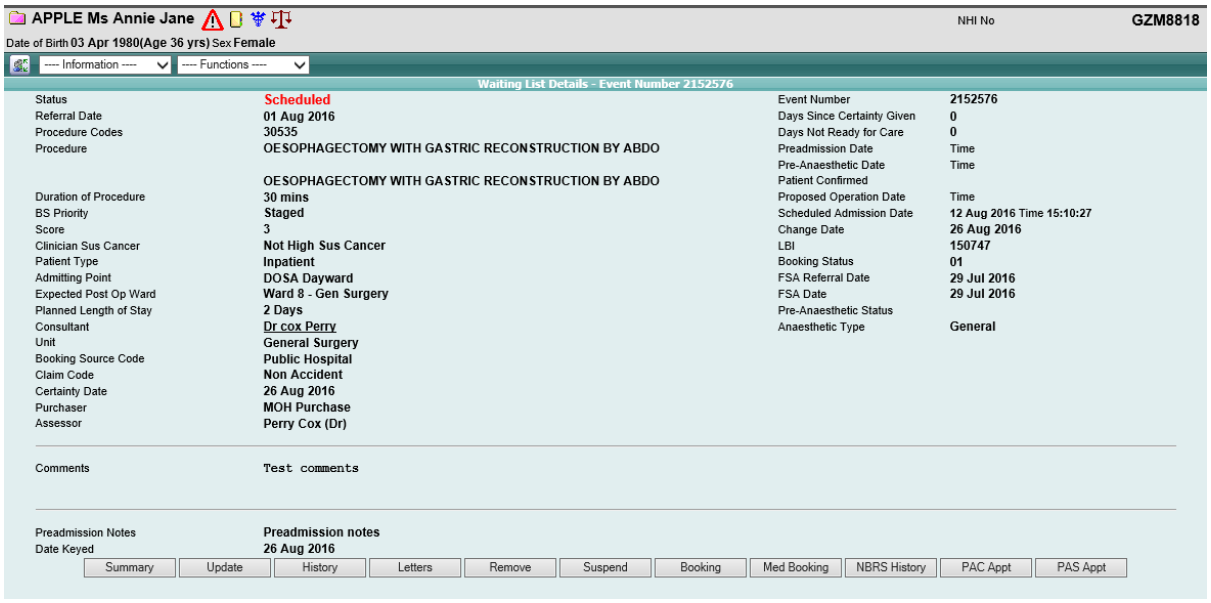


3. Click the calendar icon beside the required Waiting List entry.

The Waiting List Details screen will display.



4. For a Pre-assessment Booking click **PAC Appt**.

The Clinic Search screen will display.

5. Select a value from the Date drop down list or calendar icons.

6. Click **Search**.

The Clinic Search results will display.

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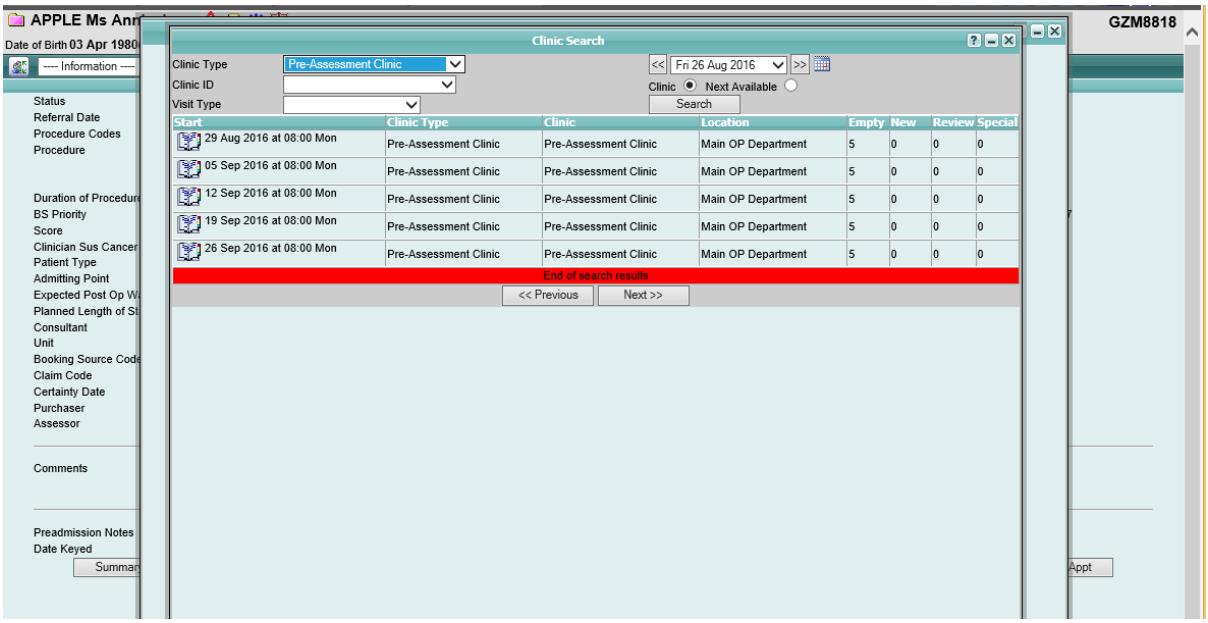
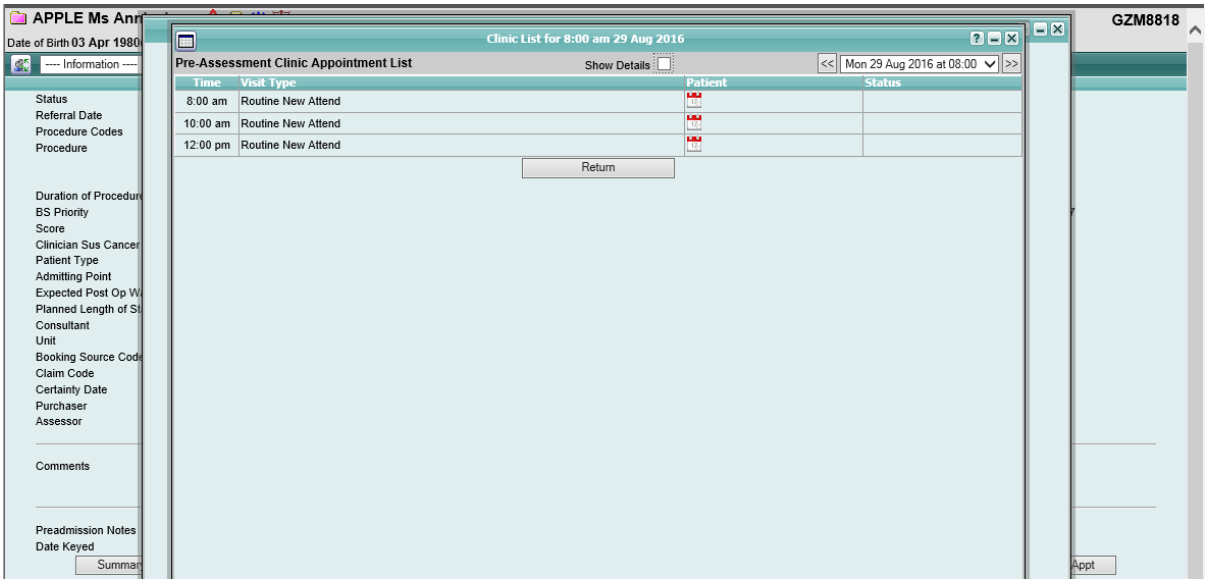


7. Click the date icon to display the available appointments.



8. Click the appointment icon beside the appropriate appointment time and visit type.

The Make New Appointment screen will display.

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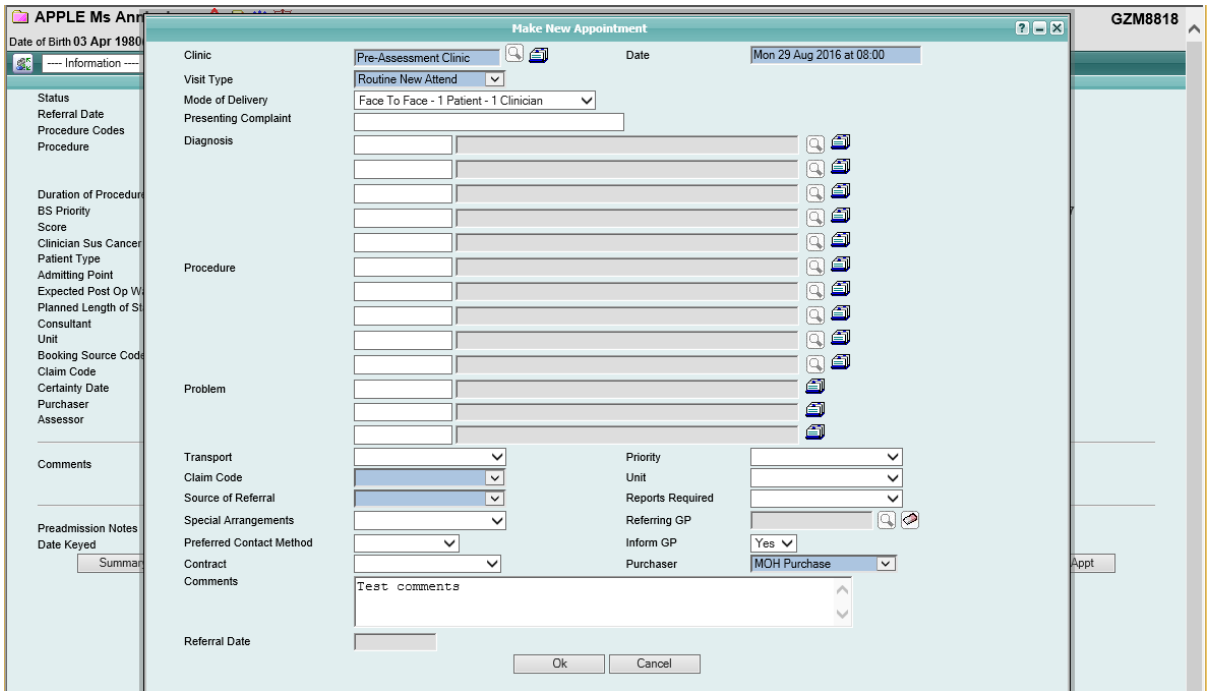
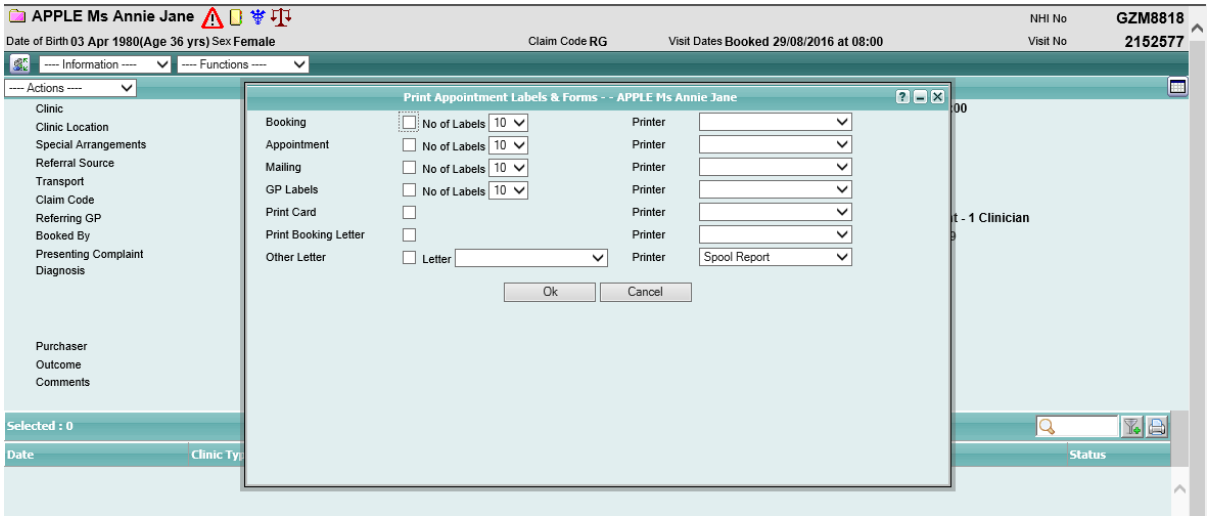


9. Complete the details as required. Refer to the Outpatient User Guide for details.

10. Click **Ok**.

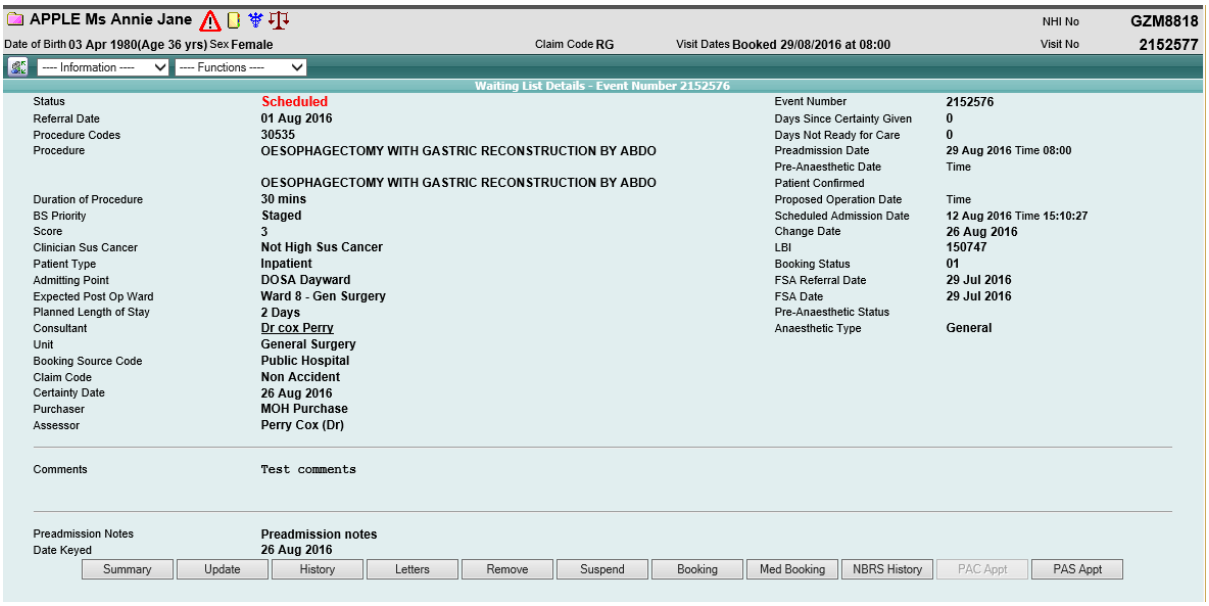
The Print Appointment Labels and Forms screen will display (depending on the configuration of your site's system).



11. Complete the details as required.

12. Click **Ok**.

The Waiting List Details screen will display. The Pre-admission Date and Time are displayed.



Note: The PAC Appt button is no longer available because only one Outpatient appointment per Waiting List entry can be booked.

Note: To make a Booking to a **Pre-anaesthetic Clinic** follow the same steps as above, but select the **PAS Appt** button. Once the Booking is made the Pre-anaesthetic Date and Time are displayed. And the PAS Appt will also be no longer available.

4.10 Accessing the Patient Visit List

The Patient Visit List displays all visits the patient has made or will make to the hospital.

1. Select the required patient.
2. Select **Visits** from the appropriate patient level drop down menu.

The Patient Visit List screen will display.

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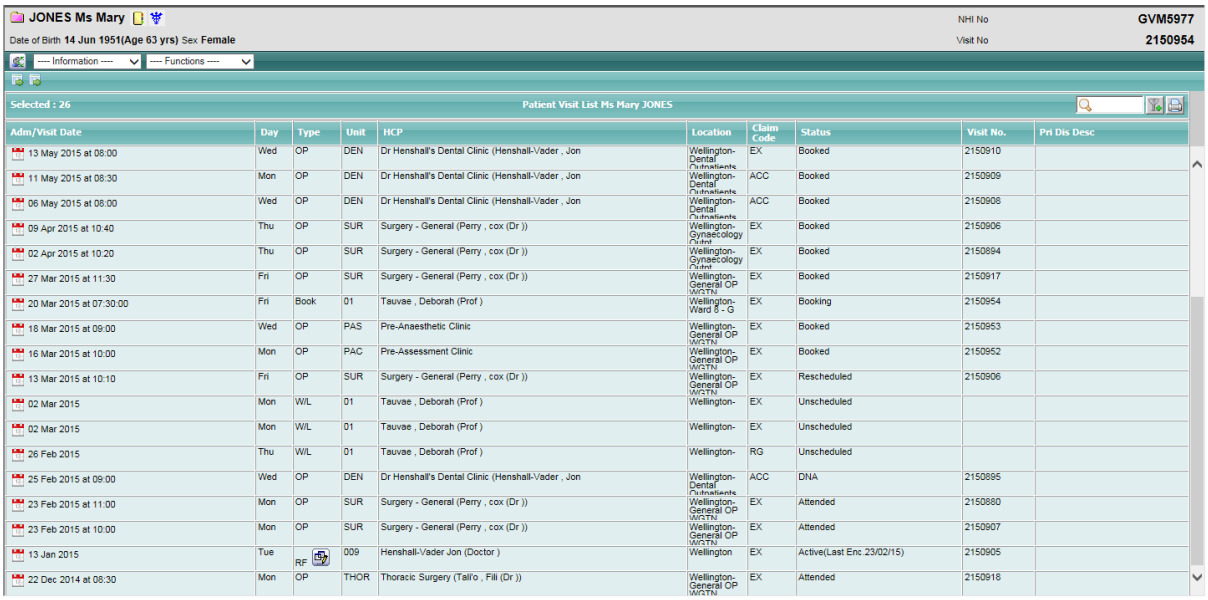

All Waiting List entries will display. The Type and Status combinations are detailed in the following table.

Where the Type column is equal to:	And the Status is equal to:	webPAS will display the following screen:
Book	Booking/Booked	Patient Pre-Admission Details
W/L	Unscheduled	Waiting List Details
OP	Booked/Attended/ DNA	Appointment Details
IP	Pre-adm/ Disc/Current IP	Inpatient Details
EMG		Emergency Patient Clinical Details

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5 Supervisor Options

The Supervisor facility enables those users with appropriate access rights to make corrections to a patient's waiting list data and to reverse processes such as changed bookings.

This section details how to:

- Access the Supervisor facility
- Correct errors in Waiting List data

5.1 Accessing the Supervisor Facility

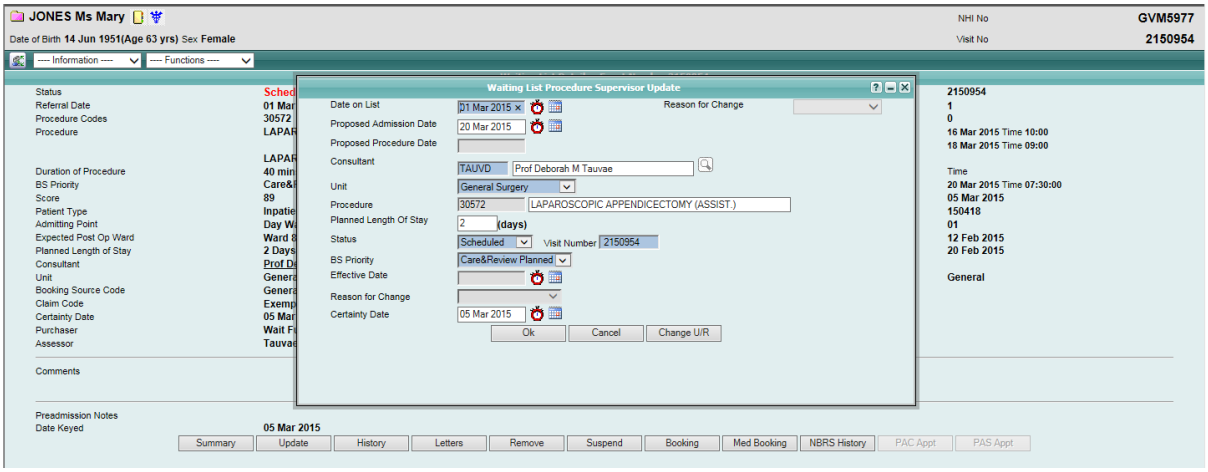
The Supervisor facility enables those with appropriate access rights to make corrections to patient waiting list data, including:

- Date on List
- Consultant
- Unit
- Status

To access the Supervisor facility

1. Select the required patient.
2. Navigate to the required Waiting List entry.
3. Select **Supervisor Options** from the appropriate patient level drop down menu.

The Supervisor Options screen will display.



4. Make any necessary changes.
5. Click **Ok**.

5.1.1 Changing Patient

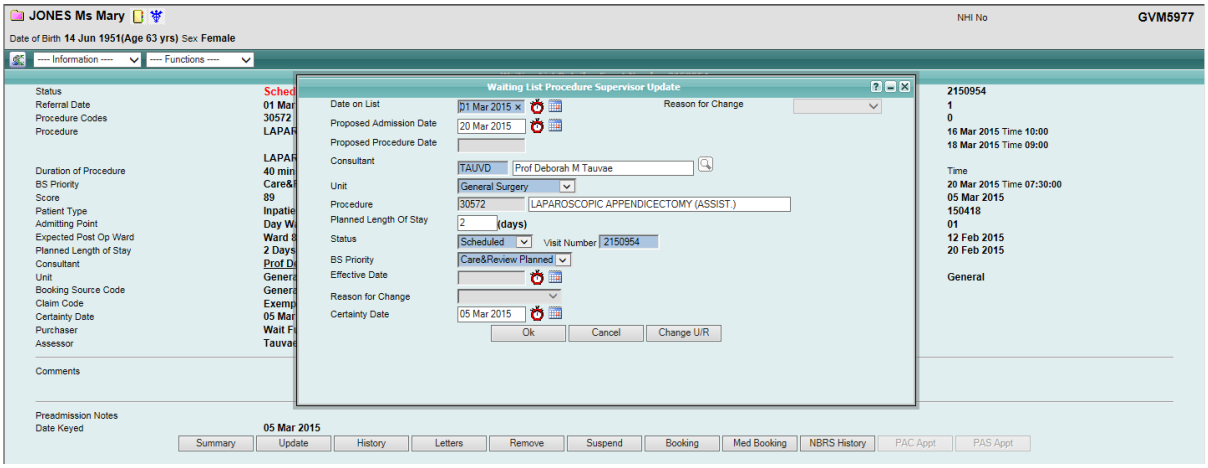
The Supervisor Option allows you to move a Waiting List record from one patient to another by changing the NHI number. This functionality is useful when a Waiting List entry has been created for the wrong patient.

1. Select the required patient.

2. Navigate to the required Waiting List entry.

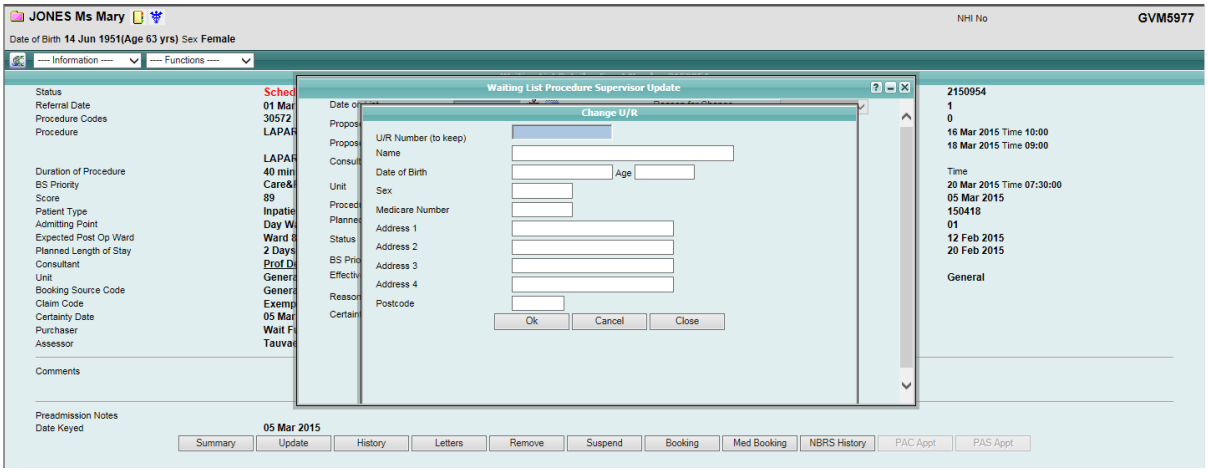
3. Select Supervisor Options from the appropriate patient level drop down menu.

The Supervisor Options screen will display.



4. Click **Change U/R**.

The Change U/R screen will display.



5. Enter the new NHI number in the **U/R Number (to keep) field**. The demographics associated with the new NHI number are displayed.

6. If the patient displayed is the correct new patient, click **Ok**. Otherwise click **Cancel**.

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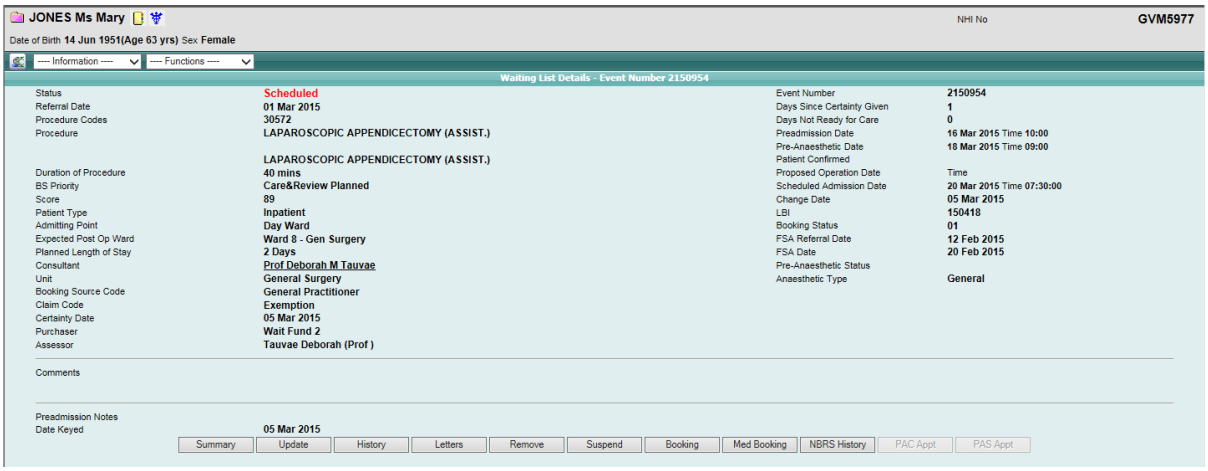
5.1.2 Supervisor Suspension

Use the Supervisor Suspension option to suspend a Waiting List entry that has already been scheduled.

1. Select the required patient.

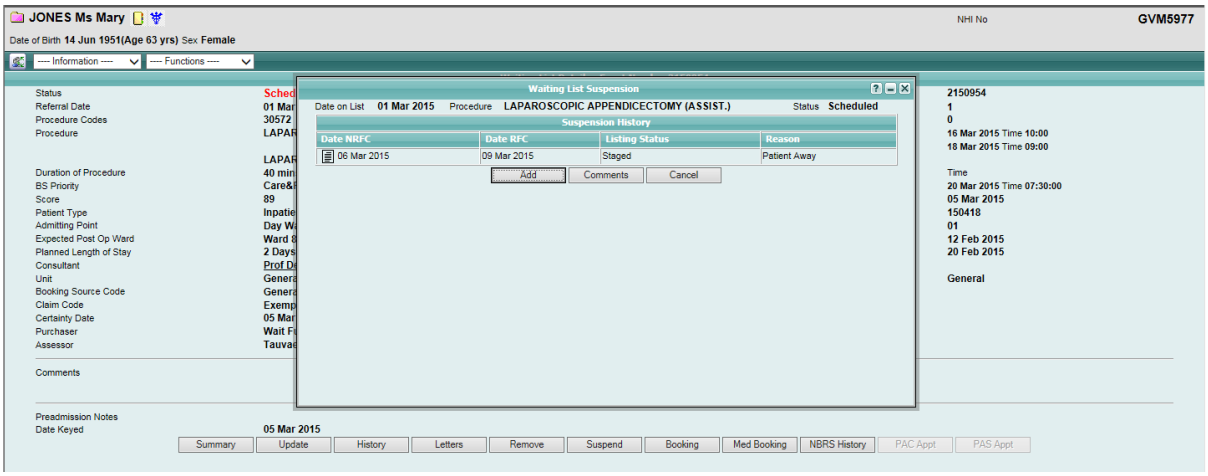
2. Navigate to the required Waiting List entry.

The **Waiting List Details** screen will display.



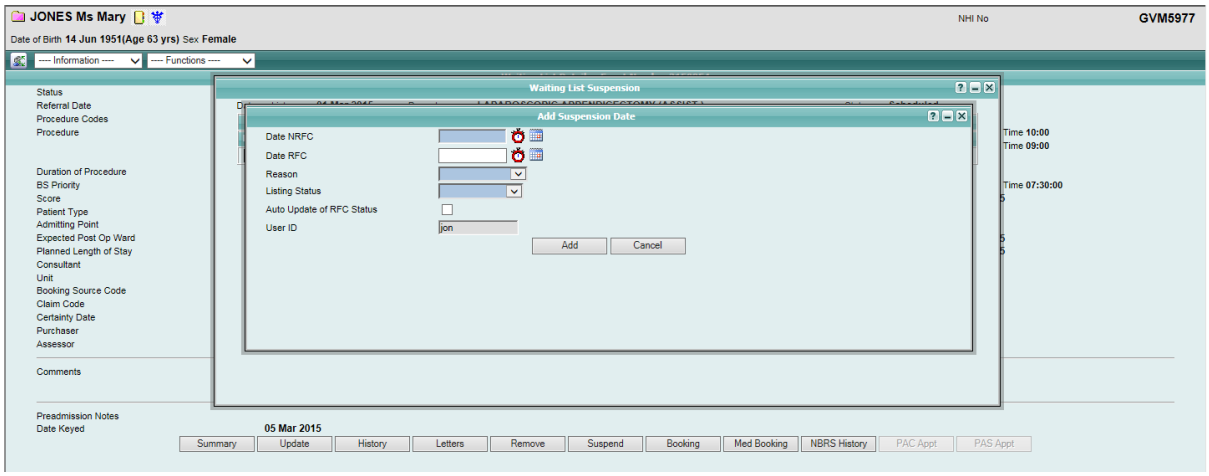
3. Select Supervisor Suspension from the appropriate patient level drop down menu.

The Waiting List Suspension screen will display.



4. Click **Add**.

The Add Suspension Date screen will display.



5. Enter the details as required.

Field	Description
Date NRFC	Enter the start date for the suspension. The Waiting List module will stop counting Ready for Care days for this entry and start counting Not Ready for Care days once you add the suspend the entry.
Date RFC	Enter the last day of the suspension, if known, otherwise leave this field blank.
Reason	Select a reason from the list for example, Patient on Holidays.
Listing Status	Select a Ready for Care Status from the list if the defaulted status is not suitable.
Auto Update of RFC Status	Select this checkbox if you entered a date in the Date To field. The Waiting List module will automatically change the patient's status from Not Ready for Care to Ready for Care and count the days appropriately.
User ID	Displays the User ID of the user logged on. This field cannot be changed.

6. Click **Add**.

The Waiting List Suspension screen will display.

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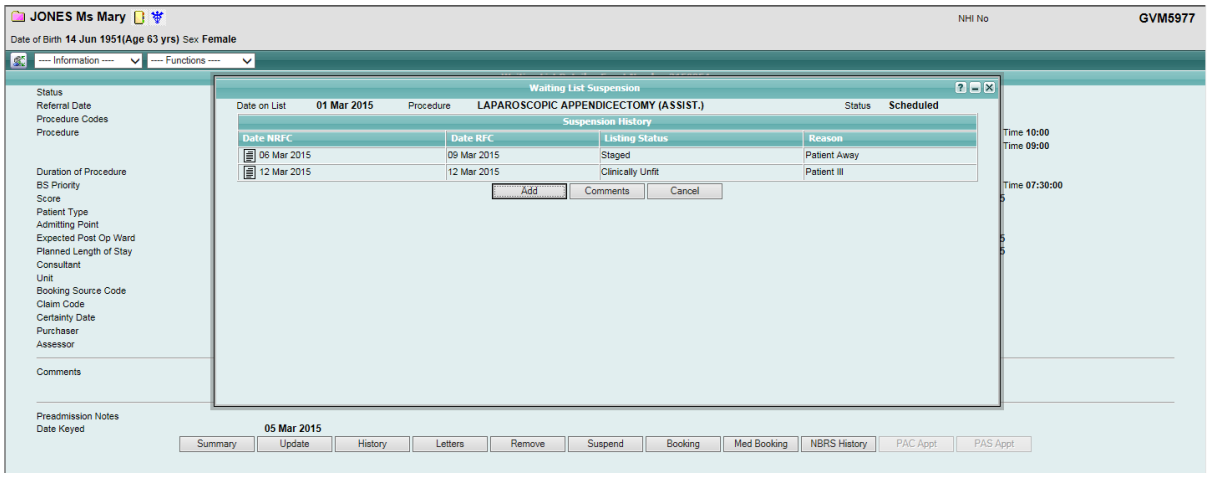

7. Click **Cancel** to return to the patient's Waiting List Details screen.

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6 Waiting List Reports

The Waiting List module provides extensive reporting facilities divided under the following menus:

- Standard
- Statistical
- Patient Extract

6.1 Requesting a Report

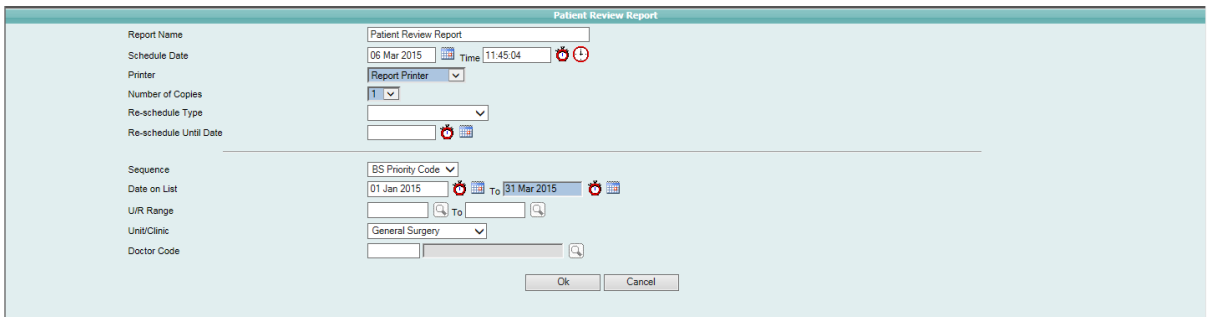
1. Click the report icon in the top right hand corner of the **Hospital** menu bar.

Alternative menus will display at the hospital level menu bar. These menus provide access to all available Waiting List reports.

2. Select the required report from the Standard, Statistical, Patient Extract or MOH Extracts menu.

The associated report screen will display. Users can specify options on how the report will be produced (e.g. reporting criteria and sorting).

Report screens differ, depending on the report selected. The example screen below is for the Patient Review report.



3. Complete the details as required.

4. Click **Ok**.

The report is printed on the selected printer.

5. Click the report icon to exit from the Waiting List reporting screen.

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6.2 Standard Reports

The following table is a list of the reports available from the Standard menu and a description of the reports.

Report	Description
Patient Review Report	This report extracts all patients on the Waiting List with a Procedure Status of **1** (Unscheduled) from the Waiting List Treatment file within the selection criteria. **Report Contents** • U/R Number • Patient Surname • Address • Sex • Date of Birth • Procedure Description • Date on List • Attending Doctor • Months on List • Telephone -Home & Bus. • Unit/Clinic • Last Review Date • Estimated Stay (days)Priority • Procedure Time (mins) • Cancellation Code
Failed Admissions Report	Use this report for those patients on the Waiting List who have failed to be admitted into Hospital on their scheduled Date/Time.
Multiple Bookings Report	Use this report to list with more than one scheduled/unscheduled/or pre-admitted procedure.
Waiting Lists Unit Report	Use this report to print a listing of unscheduled patients on surgical waiting list in Unit/Doctor/Date on list or Unit/Doctor/Priority/Date on list sequences. The report includes waiting list comments concerning the patient. **Report Contents** • Name • UR number • Date of birth • Procedure code and description • Priority code description, • Date on list and patient classification (Category A) Also included are W/L Comments and Reason Diagnosis description.

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Report	Description
Short Notice by Unit Report	Use this report to list all patients with a Procedure Status of **1** (Unscheduled) in the Waiting List treatment file within the selection criteria range with Short Notice Codes. The Unit /Clinic Code option prints in Unit/Clinic (Category WU), U/R Number, and Procedure Code sequence. **Report Contents** • Doctor Code • U/R Number • Surname/Given Name • Address • Telephone - Home and Business • Sex and Date of Birth • Procedure Description • Doctor (Option 2) • Unit/Clinic (Option 1) • Short Notice Code • Duration Proc Time • Date on List • Priority (Cat TP) • Overdue (No. Days) • Cancelled by • Cancellation Reason • M/C (W/L User Defined Field 2)
Short Notice by Doctor Report	Use this report to list all patients with a Procedure Status of **1** (Unscheduled) in the Waiting List treatment file within the selection criteria range with Short Notice Codes. The Doctor Code option prints in Attending Doctor, U/R Number and Procedure Code sequence.
Patient Removal Report - Unit/Clinic Code Sequence	Use these reports to list patients who have been removed from the Waiting List.
Patient Removal Report - Doctor Code Sequence	

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Report	Description
Scheduled Admission List - Unit/Clinic Code Sequence	Use this report to list patients scheduled for treatment by Doctor, Unit, Ward or Scheduled Admission Date. The report extracts all the patients with a status of 2 (Scheduled) from the Treatment File within the selection criteria range. Unit/Clinic Code option prints in Unit/Clinic, Scheduled Admission Date, U/R Number and Procedure Code sequence. **Report Contents** • Unit/Clinic Code / Doctor Code/ Ward Code/ Scheduled Admission Date • U/R Number • Surname/Given Name • Address • Telephone - Home and Business • Sex • Date of Birth • Procedure Description • Scheduled Adm. Date • Attending Doctor • Unit/Clinic (Category WU) • Priority (Category TP) • Estimated Stays (days) • Duration Proc Time (minutes) • W/L User Defined Field 2
Scheduled Admission List - Doctor Code Sequence	The Doctor Code option prints in Doctor Code, Scheduled Admission Date, U/R Number, and Procedure Code sequence.
Scheduled Admission List - Ward Sequence	The Ward option prints in Ward, U/R Number and Procedure Code sequence.
Scheduled Admission List - Date Sequence	Scheduled Admission Date option prints in Scheduled Admission Date, Surname, U/R Number, and Procedure Code sequence.
Current Inpatient Report	This report reads the Treatment file to extract procedures with a Procedure Status of 4 or Admitted. The report is available in Patient Surname Sequence or Scheduled Admission date sequence. Simply select the required option.
Booking Analysis by Procedure Group	Use this report to extract procedures within the specified Date on List range and the Procedure Status for each extracted procedure. The Category Change file provides any cancellations or priority change details. This report is available in Treatment Group Code, Unit/Clinic Code or Doctor Code sequence.

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Report	Description
Indicator Procedure Report	Use this report to list all the patients in the Treatment File with a status of **1** (Unscheduled), **2** (Booked) or **3** (Pre-Admitted). **Note:** The description referred to as Treatment is defined by the System Parameter (IBAWAT98) User Screen 1, field 13 Treatment/Procedure Description. **Report Contents** • U/R Number • Surname/Given • Sex • Date of Birth • Procedure Description • W/L Comments • Attending Doctor • Unit/Clinic (Category WU)

6.3 Statistical Reports

The following table is a list of the reports available from the Statistics menu and a description of the reports.

Report	Description
Waiting List Periodic Statistics Update	The following reports require the Periodic Statistics Update to be run for the relevant periods before generating the reports. • 4 Weekly Analysis of Surgical W/L • Summary of Surgical Waiting Lists • Doctors Waiting List Priority Summary • 4 Weekly Analysis of Surgical W/L • Elective Surgery Activity Return • Summary of Surgical Waiting Lists • Doctors Waiting List Priority Summary • 4 Weekly Analysis of Surgical W/L • Periodic Statistical Update • Short Notice Report • Scheduled Admission List • Category Assessment Report • Unscheduled Patients Report

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Report	Description
Summary of Surgical Waiting Lists	This report provides a summary Time breakdown of Surgical patients on the waiting list within the specific period, with reference to their clinic speciality. The report provides a summary analysing the waiting time of Surgical patients. It also provides a summary of pending priority patients on the waiting list. **Report Contents** • Clinic description. • No. of Day patients. A day patient has Category A - 2nd indicator = 1. This is calculated by Waiting List Periodic Statistic Update (IBAWAT90) and stored in the Waiting List Unit Summary. • No. of Inpatients. An Inpatient Category A - 2nd indicator does not equal 1. This is calculated by Waiting List Periodic Statistic Update (IBAWAT90) and stored in the Waiting List Unit. • Total. Column 1 + Column 2. • Col 4-9: These are the time category divisions for patients on the waiting list. The values are stored in the Waiting List Unit Summary file (watunsaf, fields WTUNRNG1-6). • Col 10: Number of forward calling. Number of waiting list patients who are booked or pre-admitted in the period specified. This value is taken from Unit/Doctor Summary File (watudsaf, field WTUDBOOK). • Col 11: Average Time on Waiting list. This calculation is the sum of patients in each date range multiplied by its midpoint value, then divided by the total number of patients on list and converted into months. Totals for each column are also calculated

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Report	Description
4 Weekly Analysis of Surgical Waiting Lists	This report provides a detail analysis of surgical waiting list patient's status concerning admissions and cancellations in relation to the doctors and their clinic speciality. The summary report contains only the clinic speciality where as the Summary report contains a breakdown of doctors associated to each clinic. The final page of the Standard Report is the summary report. **Report Options** Pending Patients Non Pending Patients **Report Contents – Non Pending patients** Last Period Number of patients on waiting list at the start of period. Sum of all WTUDLAST from Unit/Doctor Summary File within the given date period with respect to clinic speciality. Added to List Number of patients added to the waiting list in the period, but excluding those subsequently changed to a pending priority within the period. Also included are the patients who were changed from a pending to a non-pending priority status. Sum of all WTUPNUMB from the Unit/Doctor Priority Changes File (watupcaf) within given period date with respect to clinic speciality and doctor code. Admitted from list Number of patients admitted or pre-admitted from waiting list. Sum of all WTUDADMT from the Unit/Doctor Summary File within given date period with respect to clinic speciality. Deletions 1-6: These columns are the Number of cancellations due to 1-6 cancellation reasons. These values are the sum of Unit/Doctor Code File removal records within a given date period with respect to clinic speciality. Priority: • Routine • Semi-urgent • Urgent Total: The last four columns are the number of patients awaiting admission or pre-admission, segmented into their priority status. These values are derived from the sum of Unit/Doctor Summary File priority records (WTUDNUMB) within a given date period with respect to clinic speciality.

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Report	Description
4 Weekly Analysis of Surgical Waiting Lists (continued)	**Report Contents – Pending Patients** Last Period is the number of patients who were added to the list prior to the beginning of the period who currently have a status of 'Pending' and also included are patients who changed to a non-pending status during the period. Added to list is the number of patients added to the Waiting List during the period with a priority of pending. Pending Status Change is the number of patients who were changed from a non-pending to a pending priority code within the period. This is derived from the Unit/Doctor Priority Changes File (watupcaf) for the date period with respect to clinic speciality and doctor code. Deletions 1-6 columns show the patients who were deleted from the waiting list while their priority codes were pending. Status Changes is the number of patients changed from a pending to a non-pending priority code during the period segmented into their priority status. Total= (Last Period + Added To List + Pending Stat Change) - (Deletions + Status Changes)

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7 Revision History

Date	Version	Description	Author
25 June 2007	9.09	First release.	Suzanne Shaw
9 November 2008	9.09	Updated document template.	Kara Thompson
21 September 2012	10	Updated document template and to 10.01.	Kara Thompson
2 May 2014	10	New template.	Kara Jaffe
23 February 2015	10	Updated for NZ market	Jonathan Henshall
26 August 2016	10	Updated screen shots for V10.07	Juliet Iremonger

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