Wait List Setup and Support Guide

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Your Responsibilities for Safe Use

This documentation will help guide you through the available software configuration options so you can decide the right configuration for your organization. Of course, safe and compliant use of the software in any configuration requires you and your users to use good judgment and perform certain responsibilities, including each of the following: enter and read information accurately and completely; be responsible for configuration decisions; ensure compliance with laws and regulations relevant for your organization; confirm the accuracy of critically important medical information (e.g., allergies, medications, results), just as you would with paper records; actively report suspected errors in the software to both Epic and affected personnel; thoroughly test the software to ensure it's accurate before using it; and use the software only according to standards of good medical practice. You also are responsible for training your personnel and other users to perform these responsibilities. Not performing any of these responsibilities may compromise patient safety or your compliance with applicable requirements.

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Wait List Setup and Support Guide

The Wait List allows schedulers to create and manage wait list entries for patients' preferred appointment times. It's an easy way to improve patient satisfaction, both maximizing the availability of clinicians and helping patients obtain appointments that best fit their schedules. The Wait List also helps your organization keep your schedules as full as possible.

If a patient wants an appointment but the available slots are not ideal, a scheduler can make an appointment for an available slot and then create a wait list entry for a different time. The scheduler can also create patient wait list entries when a schedule is not yet available for the appointment date and time that a patient requests. Schedulers can work the Wait List report any time new slots become available.

Wait list entries contain the same information as a regular appointment (provider, department, visit type). Additional fields also appear so that schedulers can quickly incorporate wait list entries into a provider's schedule. Each entry also includes information about what days and times the patient prefers, and how long he wants to remain on the Wait List.

Related topics

You might also be interested in the following related information:

- Fast Pass Setup and Support Guide

In the Foundation System

The Wait List feature is fully active in the Foundation System and no further activation tasks are required to use it. Schedulers are prompted to jump to the Wait List when canceling appointments. Schedulers can create wait list entries from the Appointment Desk and the Patient Options menu. Schedulers can also access the Wait List from an option on the bottom of the Make Appointment window.

Even without a current copy of Epic's Foundation System, project team members can fill out the Wait List System Definitions to replicate these settings. However, project team members should consider modifying a few recommended settings if schedulers at your organization perform workflows that differ somewhat from the Foundation System.

Wait List Setup: Essentials

This section covers tasks completed by the project team before schedulers begin creating and scheduling wait list entries. This includes replicating the Foundation System settings if necessary, and customizing the Wait List report.

Importing Wait List Appointments

If you want to import wait list appointments from your legacy system, you can do so using import specification EPT,1020-Template - Patient Wait List Import. For more information about importing records, refer to the Standard Import Guide.

You can configure this import specification to link Wait List contacts to existing appointments, if available.

1. In the import spreadsheet, enter an identifier in import field 7 that matches either the Ext Visit ID (EPT 7) or Billing Number (EPT 17) field, depending on which is used for the legacy appointment identifier in the existing appointment records.
2. Set the ExternalItem metadata item to 7 or 17. This will match Wait List contacts with appointments based on the value in either EPT 7 or EPT 17, respectively (the default for this item is 7).
3. The metadata element PRCMismatch governs how the import will handle a mismatch in visit types between the imported wait list contact and the appointment. If there is a PRC mismatch and if:
    a. PRCMismatch=0, the matching appointment is not linked.
    b. PRCMismatch=1, the matching appointment is linked despite the mismatch.
    c. PRCMismatch=2, the appointment is linked, but the visit type on the imported wait list contact is changed to match the linked appointment. An informational error is logged.

Automatically Add Appointments to the Wait List

Appointments need to be on the wait list in order for patients to receive Fast Pass offers for earlier appointments in MyChart. You can save schedulers time and help more patients take advantage of Fast Pass by setting up the system to automatically add appointments to the wait list for patients who have active MyChart accounts and who have opted to receive Fast Pass offers in MyChart. With this feature enabled, the Add to Wait List button is automatically selected for schedulers in Appointment Review in Hyperspace, and the "Join the wait list..." check box is automatically selected for patients when they schedule an appointment in MyChart, even if you don't allow patients to join the wait list from MyChart. Patients also have the option of clearing the "Automatically sign up my appointments for earlier offers" check box on the Communication Preferences page in MyChart if they decide that they don't want to receive wait list offers for all appointments.

After the scheduler or patient finishes scheduling the appointment, the system automatically creates a wait list entry if all of the following conditions are met:

- The patient has an active MyChart account and has opted to receive Fast Pass offers in MyChart. Starting in November 2024, if you use Hello World's SMS gateway, which is Hello World license 185C, and a patient has opted to receive offers during open scheduling as described the Enable Fast Pass for Open Scheduling topic, a patient without an active MyChart account can join the wait list with open scheduling and receive Fast Pass offers over SMS. Your settings determine whether patents are opted in to the wait list by default or need to choose to be on the wait list.

- The start date of the search for the selected appointment would improve the patient's access by at least the number of days specified in the Min Days Improvement mnemonic of your Fast Pass batch job. If your organization has multiple Fast Pass batch jobs, the system uses the smallest Min Days Improvement mnemonic value, regardless of appointment department.
- The appointment is not one of the following types:
  - Prerequisite appointments
  - Therapy plans
  - Panels
  - Recurring appointments
  - Group appointments
  - Inpatient appointments
- The appointment doesn't meet the conditions of any exclusion rules that you can create and specify in Cadence System Definitions.

The system uses the following logic to set certain fields in the wait list entry:

- Provider. By default, all providers that the scheduler searched for while scheduling the appointment are added to the wait list entry. You can choose to add only the scheduled providers to the wait list entry.
- Priority. You can specify a default priority to use in Cadence System Definitions, Patient Access System Definitions, or the department.
- Start Date. If scheduling from an order, appointment request, recall, or referral, the system uses the start date from that record as the start date. Otherwise, the system uses the date on which the appointment was scheduled as the start date in the wait list entry.
- End Date. The system uses the scheduled appointment date as the End Date in the wait list entry.

After the wait list entry is created, your Fast Pass batch jobs and MyChart take care of the rest to get patients seen earlier as appointments open up.

You can turn on this feature at the system level in Cadence System Definitions, specify a default wait list priority, and optionally specify rules to exclude certain appointments from being automatically added to the wait list. You also need to define a default wait list priority for MyChart separately from the default wait list priority for Cadence. Refer to the Let Patients Update Wait List Status from MyChart topic for additional information.

This feature is configured at the system level in the Foundation System. If you don't want to enable this feature at the system level, you can manually turn it on for just a few departments that want to use it. You can also manually customize departments to override automatic wait list behavior for certain visit types that are scheduled in the department or turn off the feature entirely for a department.

To automatically add appointments to the wait list, you must have the Cadence Fast Pass license, which is included in the standard Cadence license. If you’re not sure whether you have this license, contact your Epic representative and mention parent SLG 3550868.

Create Rules to Exclude Certain Appointments from Being Automatically Added to the Wait List

You can choose to create rules in context 5003-Appointment Entry Begin to prevent certain appointments from being automatically added to the wait list. Refer to the Create or Edit a Rule topic for details about creating rules.

Configure the Automatic Add to Wait List Feature in Cadence System Definitions

Use the Build Wizard in Hyperspace to enable this feature at the system level and define a default wait list priority. To get started, open the Build Wizard (search: Build Wizard) and search for feature 420004-Automatically Enable Appointments for Fast Pass (application: Cadence). If you need to adjust these settings after running the Build Wizard or customize them at the department level, refer to the steps below.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Wait List form.
3. In the Default Priority (I SDF 8179) field, enter the wait list priority the system applies by default when adding a patient to the wait list from Hyperspace. This setting can be overridden at the department level. In the Foundation System, this field is set to Normal.
4. Select the Skip Jump to Editor (I SDF 8184) check box. This setting can be overridden at the department level.
5. In the Default Start Date (I SDF 8266) field, choose one of the following options to specify how the system determines the start date for the automatically generated wait list entry. Note that if the appointment is scheduled from an order, appointment request, recall, or referral, the system uses the start date from that record as the start date for the wait list entry.
    - Current date while scheduling. This is the default value. The system uses the date on which the appointment is scheduled. For example, if a scheduler makes an appointment for 11/20 on 11/10, the appointment's wait list entry has a start date of 11/10.
    - Start search date. The system uses the date the scheduler entered in the Start search on field during scheduling. For example, if the scheduler makes an appointment on 11/10 by searching for open slots starting on 11/20, the appointment's wait list entry has a start date of 11/20.
6. If you want to add only the providers that the appointment was scheduled with to the wait list entry, enter Only Scheduled Providers in the Default Providers (I SDF 8267) field. Starting in November 2023 if you use Book It and want to add all providers that the scheduler included in their search that match the location filters the scheduler entered in Book It, enter All Providers Searched with Center Filter in the Default Providers field. By default, the scheduled providers and all providers that the user searched for when scheduling the appointment are added to the wait list entry so that the appointment could be rescheduled with a different provider if an earlier slot opens up. This setting can be overridden at the department level.
    - There are a couple additional considerations to keep in mind for the All Providers Searched with Center Filter setting:
        - Providers added by decision trees during scheduling that are within the same center as the existing appointment are included.
        - When adding an existing appointment to the wait list, the rules listed in a pool’s Inclusion Rule (I PLS 210) field are run and resolved so a provider in that pool is always be included.
        - If a scheduler is adding an appointment to the wait list from the Appointment Desk instead of Book It or if the patient is adding their appointment to the wait list in MyChart, then all providers from the visit type pools that match the appointment center are added.
7. Select the Auto Add Appointments (I SDF 8251) check box. This setting can be overridden at the department level.
8. In the Auto Add Appointment Exclusion Rules (I SDF 8254) field, optionally enter rules from context 5003-Appointment Entry Begin to prevent certain appointments from being automatically added to the wait list.

If an appointment meets the criteria of any of the listed rules, it is not added automatically.

Configure the Automatic Add to Wait List Feature for Departments

1. In Hyperspace, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and open a department record.
2. Select the Appointment Requests > Wait List form.
3. In the Default Priority field (I DEP 3060), enter the wait list priority the system applies by default when adding a patient to the wait list from this department in Hyperspace.
4. In the Skip Jump to Editor by Default (I DEP 3061) field, enter Yes if you're enabling this feature for a department.
5. In the Default Start Date (I DEP 3066) field, choose one of the following options to specify how the system determines the start date for the automatically generated wait list entry. Note that if the appointment is scheduled from an order, appointment request, recall, or referral, the system uses the start date from that record as the start date for the wait list entry.
   - Current date while scheduling. This is the default value. The system uses the date on which the appointment is scheduled. For example, if a scheduler makes an appointment for 11/20 on 11/10, the appointment's wait list entry has a start date of 11/10.
   - Start search date. The system uses the date the scheduler entered in the Start search on field during scheduling. For example, if the scheduler makes an appointment on 11/10 by searching for open slots starting on 11/20, the appointment's wait list entry has a start date of 11/20.
6. If you want to add only the providers that the appointment was scheduled with to the wait list entry, enter Only Scheduled Providers in the Default Providers (I DEP 3068) field. Starting in November 2023, if you want to add all providers that the scheduler included in their search that match the Book It location filters, enter All Providers Searched with Center Filter in the Default Providers field. By default, the scheduled providers and all providers that the user searched for when scheduling the appointment are added to the wait list entry so that the appointment could be rescheduled with a different provider if an earlier slot opens up.
7. In the Auto Add Appointments (I DEP 3062) field, enter Yes to enable this feature or enter No to disable it.
8. In the Visit Type Overrides table, you can override settings for specific visit types that are scheduled in the department:
   - In the Visit Type (I DEP 3063) field, enter the visit type you want to specify settings for.
   - In the Priority (I DEP 3064) field, enter the wait list priority to apply for this visit type in this department.
   - In the Auto Add (I DEP 3065) field, enter Yes to enable this feature or enter No to disable it.
   - In the Default Providers (I DEP 3067) field, enter Only Scheduled Providers if you want to add only the providers that an appointment with this visit type was scheduled with to the wait list entry. By default, the scheduled providers and all providers that the user searched for when scheduling the appointment are added to the wait list entry so that the appointment could be rescheduled with a different provider if an earlier slot opens up.

Allow Schedulers to Add Appointments to the Wait List from Appointment Entry

When schedulers are in Book It or the Make Appointment activity, they might realize that they can’t schedule an appointment for the patient because the provider’s schedule is full and offer to add the patient to the wait list. To make this easy for schedulers to do from Book It or Make Appointment, you can set up Cadence System Definitions to show a Wait List button in Book It or Make Appointment. When schedulers click Wait List, the system opens the Add to Wait List activity and copies over the appointment information they entered in Book It or Make Appointment.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Wait List form.
3. Select the Can Add From Appt Entry (I SDF 10257) checkbox. This checkbox is selected in the Foundation System.

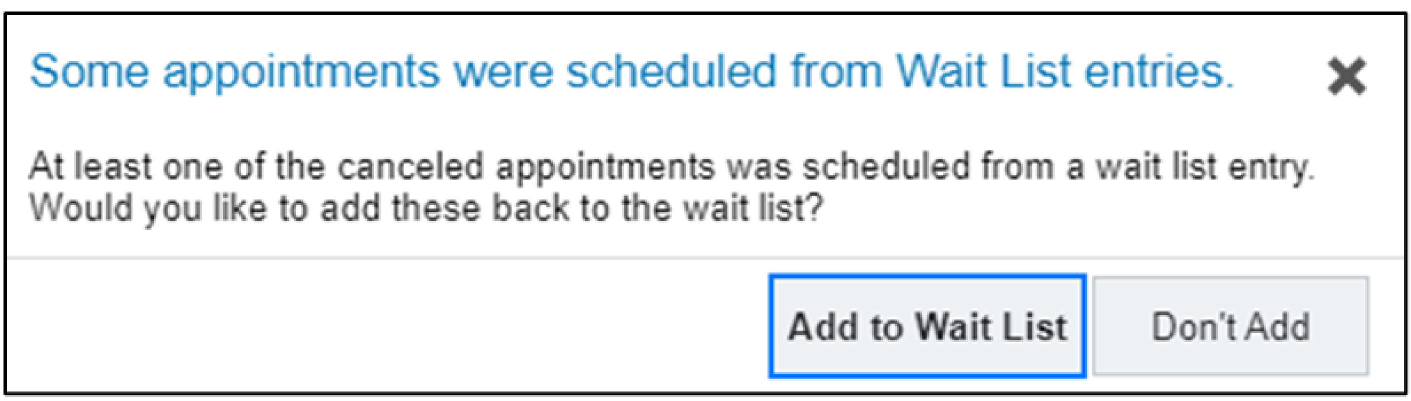
Hold Open Slots from Canceled Appointments to Use for Scheduling From the Wait List

The system can hold slots that were opened up by canceled appointments so that they can be filled only with an appointment from the wait list. This can be helpful if your schedulers jump to the Wait List work list after canceling appointments. It does not apply when the Disable Jump To Report (I SDF 8119) checkbox is selected or when appointments are canceled by patients in MyChart who accept Fast Pass appointment offers.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Wait List form.
3. Select the Hold Slot After Jump (I SDF 10252) checkbox. This checkbox is selected in the Foundation System.

Prompt Schedulers to Put Canceled Appointments Back on the Wait List

When a scheduler cancels an appointment that was scheduled from a wait list entry, they are shown a prompt asking them if they want to add the appointment back to the wait list. For example, say that the patient cannot make the appointment time anymore, but still wants to be considered if a new time opens up in the future. When the scheduler is prompted to add the appointment back to the wait list, they click Add to Wait List and the patient's previous wait list entry is reverted to a status of Pending.



The scheduler is prompted to add the canceled appointment back to the Wait List.

This prompt in on by default, but starting in August 2024, in May 2024 with special update E10905296, and February 2024 with special update E10810110, the prompt can be turned off so that organizations can save a click if they never add appointments back to the wait list when canceling them. For example, organizations that link every appointment to a wait list entry may prefer to add appointments to the wait list during rescheduling rather than when the appointment is canceled.

To turn off the prompt:

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Wait List form.
3. Select the Skip Add to Wait List When Canceling (I SDF 8556) check box.

Jump Schedulers to the Wait List Work List After They Cancel Appointments

To help get patients off the wait list faster, the system can prompt schedulers to go to the Wait List work list after they cancel an appointment so they can fill the appointment right away.

Considerations
If you select the Disable Jump to Report (I SDF 8119) checkbox in Cadence System Definitions, the system does not prompt schedulers to review the Wait List when they cancel appointments. You might want to select this checkbox if schedulers find that the jump to the Wait List feature disrupts their workflows. If your organization decides to turn off this jump to the Wait List, schedulers should review the Wait List report frequently to avoid missing opportunities to schedule wait list entries after another patient cancels. Even when the Disable Jump To Report checkbox is not selected, it's still important for schedulers to review the report regularly in order to verify that they have scheduled appointments for all available openings. Changes in provider templates or other circumstances may allow schedulers to fill additional appointment slots, so you should assign staff members to monitor the report regularly for new scheduling opportunities.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Wait List form.
3. Make sure the Disable Jump To Report (I SDF 8119) checkbox is not selected. This checkbox is not selected in the Foundation System.
4. If you use custom wait list statuses (I EPT 7255), specify the ones for which wait list entries should appear in the Wait List work list when a scheduler jumps to the Wait List after canceling an appointment. If you leave the Custom Statuses After Jump (I SDF 10805) field blank, only wait list entries with a status of 1-Pending appear in the Wait List work list in this scenario. This field is blank in the Foundation System because we have not created custom wait list statuses.

Cancel Appointments That Are Rescheduled from the Wait List

Keep your schedules tidy and save schedulers time by setting up the system to cancel appointments that are rescheduled from the wait list. When users schedule a new appointment for an appointment that was on the wait list, the system automatically cancels the original appointment only if you've specified a default cancellation reason to use. Users are not prompted to cancel the original appointment, so we recommend specifying a default cancellation reason so the appointments get canceled and patients don't arrive for unnecessary appointments.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).

2. Select the Appointment Requests > Wait List form.
3. Enter a reason in the Default Cancel Reason (I SDF 8152) field. This field is set to Scheduled from Wait List in the Foundation System.

Design Wait List Work Lists

The Wait List work list allows schedulers to view a list of wait list entries for a designated group of providers. Like many other work lists and reports in Cadence, project team members can customize the Wait List work list to meet the needs of a variety of users and situations.

The Criteria tab of the Wait List Report Settings window includes all of your organization's Wait List work list parameters and settings. Schedulers can control how information appears in the work list and build work lists for entire departments or roles.

Considerations
Who manages the Wait List work list at your organization? If each department manages its own Wait List, a project team member can set up the work list to show wait list entries for clinicians within a single department. If a central group manages the Wait List for your entire organization, a project team member can modify a few report settings to show all wait list entries across departments. In the Foundation System, wait list entries are stored for 10 days. Storing the data longer allows departments and users to report on Wait List information. Extending the storage time for these contacts does not have a significant impact on system performance.

Refer to the Wait List Work List entry in the Report Repository for information about the report as well as example use cases.

Specify Search Criteria for the Wait List

The Wait List Report Settings window allows you to filter for wait list entries based on a variety of criteria, such as provider, department, and priority.

From the Wait List Report Settings window, you can specify a variety of criteria:

- Provider or resource: Search for a specific provider, subgroup, or providers within a specific department, specialty, or center. This includes the option to search for only providers, only resources, or both. Wait list entries that contain these providers appear on your report.
- Wait Contact Type: Filter results by wait list type. This includes the option to search for only wait list entries linked to an existing appointment, only wait list entries that are not linked to an existing appointment, or both. This criterion is available starting in November 2023.
- Visit Type**:** Filter results by the visit type associated with the wait list entry.
- Status: Select all wait statuses or a subset by which to filter report results.
- Lowest priority: Any wait list entries with this status or higher appear on the report.
- Maximum appt length: Only wait entries with an appointment length of this value or lower appear on your report.
- Show provider slots: If this checkbox is selected, a list of available provider slots appears in the bottom half of the report alongside your results.
- Date Range: Specify a date range to search for wait list contacts. Wait list entries with start dates that fall

within the date range you specify appear on the report.

Automatically Refresh the Wait List Report

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Wait List form.
3. Enter a number of minutes in the Minutes to Refresh (I SDF 8321) field.

Restrict Open Slots for the Wait List Report

By default, the Open Slots section of the Wait List work list shows all open slots that match at least one of the entries in the report. You can narrow this down to only slots that match the block type of the selected wait list entry, or you can show all open slots but warn schedulers when the block type doesn’t match.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Wait List form.
3. Enter one of the following values in the Restrict Open Slots (I SDF 8121) field:
   - Restrict by Block Type. Only open slots with matching block types appear.
   - Show All Open Slots. All open slots appear. This is the default value if you leave this field blank.
   - Prompt User. All open slots appear and schedulers are warned when they select a slot that doesn’t match the block type.

Wait List Setup: Bells and Whistles

This section discusses additional tasks for setting up the Wait List. This includes Foundation System alternatives, such as disabling the Wait List and creating custom Wait Appointment forms.

Design the After Scheduling Workflow For Appointments Scheduled from the Wait List

If you want to collect patient information after scheduling wait list entries that is different from the information you collect after scheduling an appointment, you can customize this information with advantage activity records.

To set up an after scheduling activity for the Wait List, you need to build the advantage activity record and then enter the record at the system or department level. The department level overrides the system level. The activity appears based on the appointment department.

Build An After Wait List Advantage Activity

Refer to the Set Up After Appointment Entry Advantage Activities topic to create an after wait list advantage activity. Make sure to enter 17-After schedule from Wait List in the Access Points field.

Add the Custom Advantage Activity Record to Your System Settings

1. In Hyperspace, choose a path:
   - To activate this at the department level, go to Epic button > Admin > Schedule Admin > Master File Edit > Department and enter a department.
   - To activate this at the system level, go to Epic button > Admin > Schedule Admin > Cadence System Definitions.
2. Go to the Workflow Definitions > Adv Activities Add'l form.
3. Under the Wait List heading, enter your advantage activity record in the After appointment entry (I SDF 14016 or I DEP 1416) field.
4. In the Show appointment review? (I SDF 14092 or I DEP 1131) field, enter No if schedulers don't need to see the Appointment Review window when scheduling appointments from the Wait List. The default value is Yes.

Turn Off the Wait List Prompts

If schedulers should not use the Wait List at this time, project team members can also disable Wait List functionality in Hyperspace. This does not turn off the Wait List, but the system no longer prompts schedulers to use the Wait List.

Considerations
During initial training and go-live, project team members can enable the Wait List if schedulers are already using one to maintain existing workflows. If schedulers aren't currently using a wait list, implement it post-live after they have become more familiar with Cadence.

1. In Hyperspace, open Cadence System Definitions (search: Cadence System Definitions).
2. Select the Appointment Requests > Wait List form.
3. In the Disable wait list jump after cancel? (I SDF 8119) field, enter Yes to prevent the system from

prompting the schedulers after they cancel appointments.

4. In the Can add from Appt Entry? (I SDF 10257) field, enter No to prevent the Wait List option from appearing on forms when schedulers are using Full Appointment Entry.

Link Appointments with Wait List Entries for Easy Maintenance

Linking appointments to wait list entries saves time for schedulers who would otherwise have to manually delete a patient's future appointment after they schedule the patient's wait list entry. Rather than manually moving patient information, schedulers can cancel the future appointment and the system automatically copies data from the future appointment to the new appointment before the appointment is deleted.

So that schedulers can use this feature, a project team member must set up the Wait List to cancel associated appointments and define a cancel reason for appointments canceled when schedulers schedule a wait list entry. Refer to the Cancel Appointments That Are Rescheduled from the Wait List topic topic to learn about these settings.

1. In Hyperspace, open Cadence System Definitions or your department record.
2. Select the Appointment Desk > Configuration form in Cadence System Definitions or the Appointment Desk Configuration form in your department record.
3. Click Edit Report in the Future Appts Tab section. The Report Settings window appears.
4. In the Available Appointment Actions list, select the Add Appt to Wait List and add the option to the Appointment Right Click Actions list.
5. On the Display tab, add the Appt Linked to Wait List column to the Selected Columns list.
6. Click Save to save these changes to the tab.

Configure Automatic Wait List Entries by Department

You can configure whether your system automatically creates wait list entries with a default priority by setting the Default Wait List priority (I SDF 8179) and Skip jump to editor by default (I SDF 8184) fields in Cadence System Definitions, but you might have specific departments that should be configured differently from these system-wide settings. Completing setup for a department overrides the system settings for that specific department.

To override the system behavior for the automatic creation of wait list entries:

1. In Hyperspace, open the department you want to edit (search: Department Edit).
2. Go to the Appointment Requests section on the Wait List form.
3. To override whether automatic creation of wait list entries is enabled for the department, enter a value in the Skip Jump to Editor by Default (I DEP 3061) field.
4. To create a department-specific default priority override, enter your chosen default priority in the Default Priority (I DEP 3060) field.

Design Inpatient Wait List Reports

The Inpatient Wait List displays all currently admitted patients who have a wait list entry for the department or unit within the date/time range you specify in the report criteria. A patient's wait list entry does not appear in the report results until the patient is admitted.

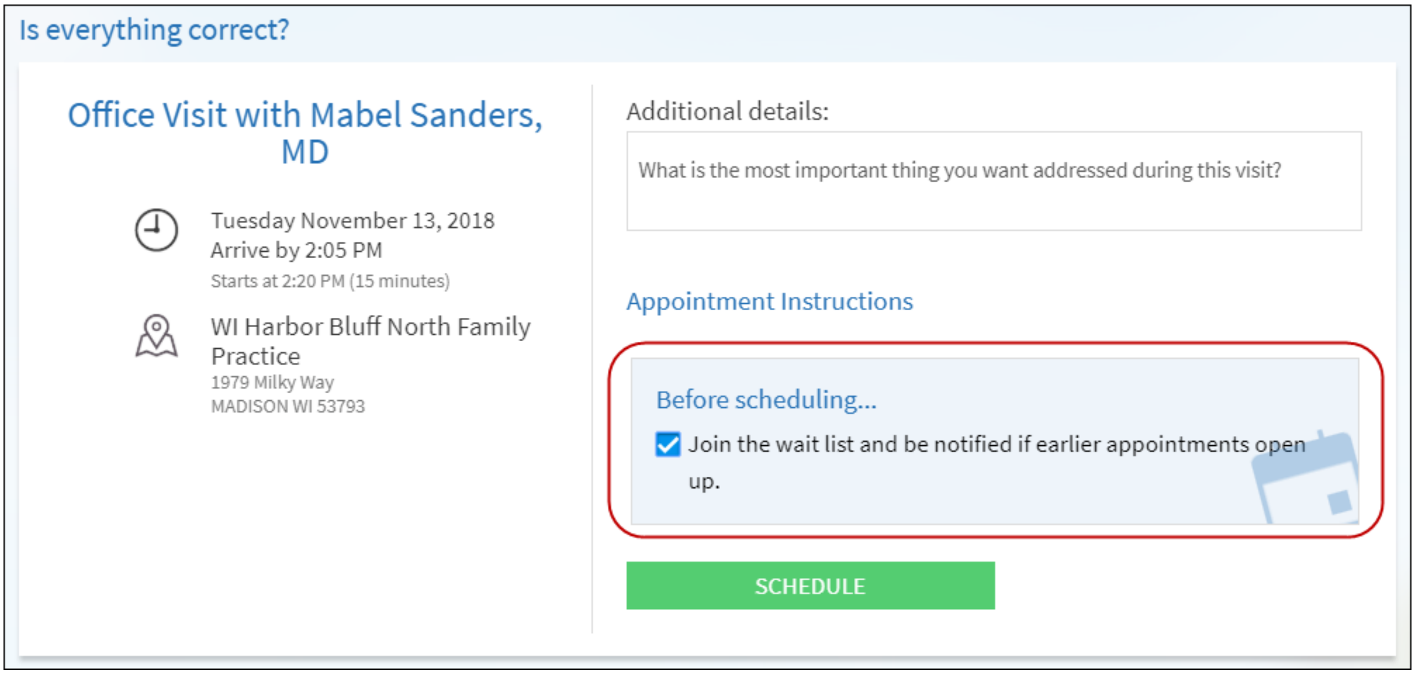
The Criteria tab of the Report Settings form includes all of your organization's report parameters and settings.

Schedulers can control how information appears in the report and build reports for entire departments or roles.

Refer to the IP Wait List Report topic in the Report Repository for information on configuring and using this report.

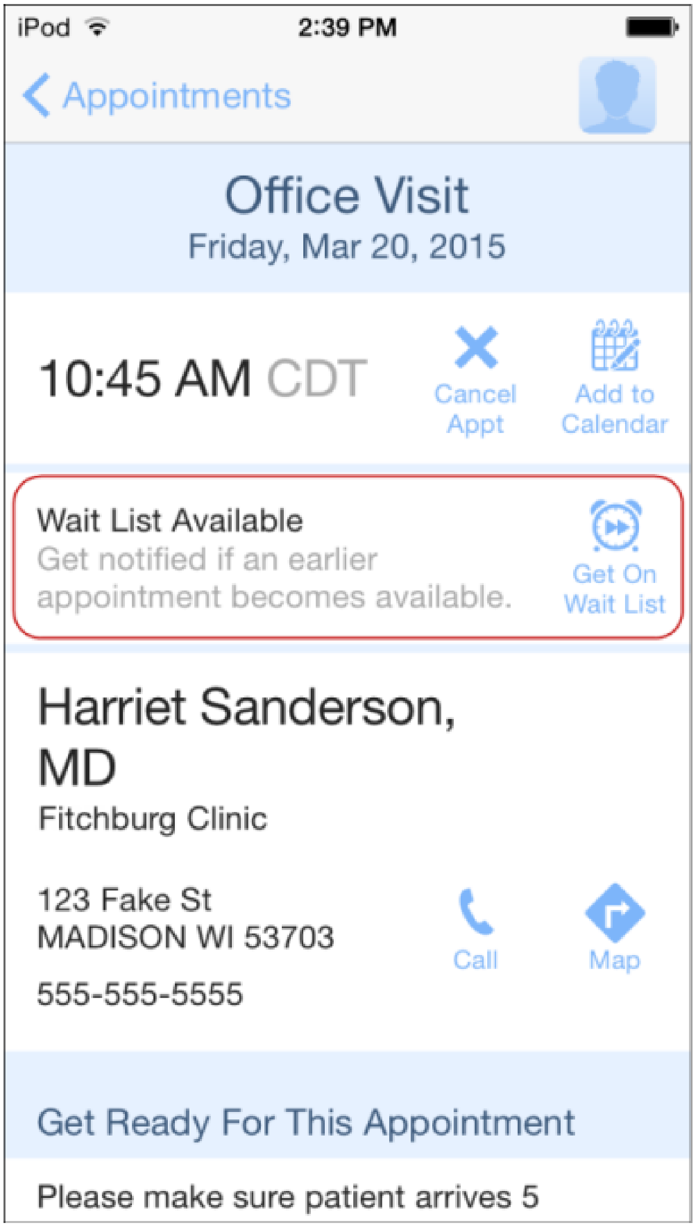
Let Patients Update Wait List Status from MyChart

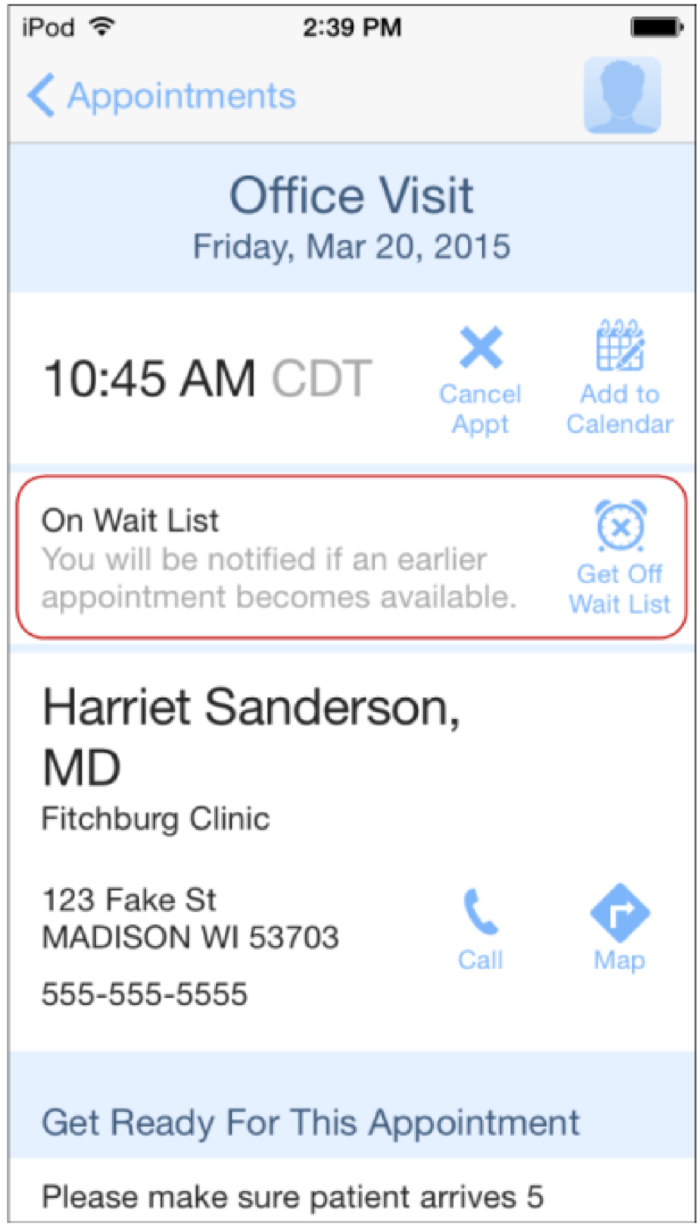
To help find appointment times that are most convenient for them, patients can update their wait list status directly from MyChart. If a patient is not currently on the wait list but would like to be notified if an earlier appointment becomes available, they can select the add to wait list option during the scheduling workflow if your organization uses Fast Pass, on the appointment confirmation page after scheduling an appointment, or on the Appointment Details page for an upcoming appointment. If the patient is already on the wait list but no longer wants to move their appointment time, they can remove themselves from the wait list so that they no longer receive appointment offers for that appointment.



If you use Fast Past appointment offers, as described in the Fast Pass Setup and Support Guide, patients receive an appointment offer if a wait list appointment becomes available. If you do not use Fast Pass, scheduling staff can process patient-added wait list entries using their normal workflows (for example, by running the wait list report) and then notify patients by email, phone, or MyChart message when a wait list appointment is available.

This feature is also available in the MyChart mobile app, but the button and link are named Get On Wait List and Get Off Wait List, respectively.





The system uses a hierarchy of settings with the following checks to determine whether a particular appointment can be added to the wait list. If the answer to both of these questions is Yes, the appointment can be added to the wait list.

- Are wait list updates allowed for the appointment's visit type in the appointment department? They are allowed if the Visit Type Overrides table in the department record does not have this visit type listed, or if the visit type is listed but the Allow add to wait list? field is left blank in the visit type record.
- Are wait list updates allowed for both the appointment department and the appointment visit type?
  - All departments can be enabled by default at the system level, or departments can be enabled or disabled individually.
  - Visit types are enabled by default if not specifically configured.

Considerations
If the Default wait list priority field is left blank, patients cannot add appointments to wait lists.

Enable Wait List Updates at the System Level

1. From the MyChart System Manager Menu, select Scheduling Configuration and access the Appointment Options 3 screen.
2. In the Enable departments by default? field (I WDF 887), enter Yes to enable all departments for wait list updates by default. If you set this field to Yes, you must individually disable any departments for which you don't want to use this feature. The default value is No, and you must enable departments individually.
3. In the Default wait list priority field (I WDF 888), enter the priority for wait list entries created by a patient. If this field is left blank, patients cannot add appointments to wait lists.

Enable or Disable Wait List Updates at the Department Level

1. From the MyChart System Manager Menu, select Master File Entry > Department.
2. Open a department record and access the Direct Scheduling Settings 1 screen.
3. In the Allow add to wait list? (I DEP 53210) field, enter Yes to enable the department individually or No to disable the department individually. If this field is left blank, whether the department is enabled or disabled depends on how you set the Enable departments by default? field at the system level.
4. You can optionally override the department level setting above for specific visit types within the department by setting the WtLst? (I DEP 53260) column to Yes or No for each visit type in the Visit Type Overrides table on the same screen.

Enable or Disable Wait List Updates at the Visit Type Level

1. From the MyChart System Manager Menu, select Master File Entry > Visit Type.
2. Open a visit type record and access the Appointment Settings screen.
3. In the Allow add to wait list? (I PRC 32310) field, enter No to disable this feature for the visit type. By default, visit types are enabled for this feature.

Give Patients Security to Update the Wait List

To give patients the ability to update their wait list status on the MyChart website or in the mobile app, add security point 175-Update Wait List to your patient access classes.

Refer to the Build and Assign Patient Access Classes topic for information about modifying and managing access classes.

Show Procedure Information in the Wait List Activity

Schedulers can see information about any procedures that are associated with an appointment when working in the Wait List activity. To give them access to this information, we've enabled report column 1050-Procedure for Wait List activity reports, which shows this information. This feature is useful if schedulers at your organization want to prioritize their work by procedure type in the Wait List activity.

Additionally, you can add any order-based report column to Wait List activity reports. For example, if schedulers also wanted to see the priority of an order, you could create a copy of report column 1053-Order Priority and add it to the report.

1. Open a Wait List activity report (search: Wait List) and click Settings.
2. On the Display tab, add report column 1050-Procedure to the Available Columns field if it isn't already there.
3. Add report column 1050 to the Selected Columns field.

4. Repeat these steps for other Wait List activity reports as needed.

Show Risk Score Information on the Wait List

If you're using both Cadence and Healthy Planet, you can show patients' risk of hospital admission or ED visit in Wait List reports to help schedulers offer appointments to high-risk patients first. For information about showing risk score information in Wait List reports and other scheduling tools, refer to the Use Risk Scores to Guide Appointment Scheduling topic.

Track a Patient's Reason for Joining the Wait List

Starting in November 2024

You can let schedulers view and track patient-entered reasons for being on a wait list. Schedulers can use the reasons that patients enter to inform their scheduling decisions from the wait list. To learn more about how to set up the reasons, refer to the Track a Patient's Reason for Requesting an Appointment and Getting on the Wait List topic.

Wait List Support: Ongoing Tasks

Monitor Work List Usage Trends

Clinic managers can monitor work list usage from Radar dashboards to make sure schedulers are using these tools and follow up with those who aren't. They can also see trends over time to determine whether their efforts increased use of the work lists.

You can use dashboard components to show the number of entries on reports for the following work lists:

- Confirm work list
- Follow-up work list
- Interpreter Scheduling work list
- Recalls work list
- Reschedule work list
- Wait List

Prerequisites
You need to be using Radar with Cadence to see information on work list usage.

There are three setup steps to see work list information on dashboards:

1. Link Follow-up work lists to departments so the batch job knows what department to use when collecting the report data. If you are not reporting on Follow-up work list usage trends, you can skip this step.
2. Define a batch job to collect the data from work lists.
3. Add dashboard components to dashboards so managers can see work list data.

Define a Batch Job to Collect Work List Data

Set up a batch job based on batch template 170-ES Work List Summary to collect work list information. Make sure to run this batch job on a recurrence, based on how you want to view changed information in the components. We recommend you run this batch job weekly.

For additional information on setting up batch jobs, refer to the Batch Scheduler Setup: Essentials topic.

Add the Dashboard Component to Dashboards

Add dashboard component 55010-ES Work List Summary to your reporting dashboards.

For information on setting up dashboards, including how to configure and add the new components to a dashboard, refer to the Radar Setup and Support Guide.

Remember to remind dashboard users that they need to select the public reports they want to view in their individual dashboards before they can see work list data in the components.

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