2014 Accuro Waitlist Change - User Guide

Orientation Video: http://youtu.be/dBZuj5zPRTU

Over the past year, QHR has been working on a project to improve the Waitlist module. We are pleased to announce its readiness in the upcoming release of Accuro.

These are big changes, and to many this is going to mean a workflow change which will take a bit of getting used to. It is for the better, and has the strong intent of increasing the ability for you to capture data on your referrals.

First impression is wow, that's a lot of fields. The good news is that very few of these are required, so there are no extra steps that are mandatory.

Start reading the fields and you will see some very important data points for collecting information on your incoming referrals.

Step 1: Receiving a Referral

When you receive a referral, the recommended steps are to add the patient to your waitlist for the scheduling of the First Consult:

1. Press **CTRL-L** to bring up the New Booking Request
2. Fill in as many (or few) of the fields as you like. Recommended:
   a. Complaint
   b. Referring Provider
   c. Request Date (Date you got the letter) and Referral Date (Date on the letter). Yes, these likely are the same dates or close.
   d. Status = Waiting

Step 2: Booking the First Consult

Book the appointment in the scheduler, and when you do you will see a pop-up indicating the patient is on the waitlist (from Step 1). Select "First Consult" from the selection list at the bottom then press Ok.

Reflection: At this point you have now collected: referral date, reason for referral (complaint), and first consult date. With this data collected on your patients, you can figure out "Wait One"; the time it takes a new referral to be seen.

Step 3: Surgical Decision

Once seen in consult, the waitlist record continues. In the booking screen you will see a new tab called "Surgical". In here you can enter a decision date, type, patient availability, priority, and status. What is great about this change to Accuro is that your consult information stays in the consult tab, and the surgical information goes in the surgical tab.

At the bottom of the screen, you will still have your Procedure area which you can fill in anytime.

If the patient is non-surgical, then you can select this as its Type. At the top of the screen, there is an overall state which allows you to close the entire request.

Once scheduled for surgery, you can either manually enter the "Booked Date" in the surgical tab, or book the appointment and it will prompt you to select Booked Date.

Reflection: At this point you have now collected: Decision Date, Booked Date, Type, and Procedure. With this data collection on your patients, you can figure out "Wait Two"; the time from decision to procedure.

Summary:

These changes should allow you to track the patient's entire progression through the clinic in a single booking request. The additional fields let you separate the Consult booking data from the Surgical booking data. I realize there are more fields to look at, but taking advantage of these can be very powerful.

Read on for more detail on the Waitlist fields.

User Guide: New Waitlist

The Changes to the Waitlist are in the Booking request screen, which is accessible by double clicking a waitlist item, or creating a new one (CTRL-L).

The Booking request screen contains new fields, and a division of information divided in two tabs: Consult and Surgical.

Let's start with the new Case fields in the upper right hand corner.

Case Number: This is auto-assigned, but also lets you overwrite the number to case number system you may already be using.

Case State: This is intended to allow you to mark the waitlist item as Closed, Cancelled, Accepted, or even add your own states by selecting the Manage option in the selection list. Once you start using this, you have these items show or not show from you main waitlist screen.

Case Close Date: For closing items and recording the date you did this.

Moving on down the screen, the same familiar fields exist for capturing information on the referral including the Complaint (otherwise known as the Reason for the Referral).

Now let's review the two tabs; Consult and Surgical. The concept is based around the fact that referrals are first seen in consult, then only some are decided as surgical. In some clinics that are not surgical, only the consult tab may need to be used. That's ok. With all these new capabilities, you do have the option to use just the fields that apply to you.

Consult Tab

When you receive a referral, the most important fields are the date fields. You will likely only be able to fill out two of them at this point:

Request Date: The date you are adding this referral in to Accuro.

Referral Date: The date on the referral letter.

Once the dates are filled, you can choose optionally to use the other fields. Priority can be set, or some people create and use a priority of "Unassigned" at first, then select a priority later. Others don't use this for normal referrals and onl y select a higher priority for urgent ones.

The recommended Type at this point is "Office Consult"

The recommended Status at this point is "Waiting"

There are some checkboxes below that are new. Here is what they mean:

Follow-up: A follow-up appointment is required

Referred Out: You have referred this patient to another clinic.

Specific Provider Requested: Referral or Patient has asked for only a certain provider, not just any provider at the clinic.

Expedited: This request is to be treated special and expedited through the booking waitlist.

Now that the referral is recorded in the system, keep accessing this single booking request on the patient and filling out more dates and information as they move through the process in your clinic.

TIP: The fastest way to bring up a patient waitlist item is by pressing F4, then go to the Waitlist History Tab. Press Open to Edit.

The other dates in the screen are there for you to fill out as you like, and the most important next date to fill out is the **First Consult** date once you have booked the patient their consult appointment. A nice feature in Accuro is the prompt when booking an appointment to Auto-update the waitlist dates.

Advanced Set-up Tip: If you are logged in as an administrator, you can configure the dates in the Waitlist Screen by selecting Tools, Manage Date Type. Here you have hide some dates to make your screen look cleaner, and select what Type is set when users pick the date from the scheduler prompt. A good example of this is to link the First Consult date to a status of "Booked".

Using the up and down blue arrow buttons, also adjust the order the dates show in the screen. Even add your own dates using the green plus button.

<u>Surgical Tab</u>

The new surgical tab is meant to track at the point of a decision for surgery. The decision date is the start of this . If the decision is non-surgical, you can still record the decision date, but them set the type to non-surgical and use the case status at the top of the screen to Closed if you no longer want the patient on your waitlist.

If it is a surgical decision, the procedure can be entered at the bottom of the screen as it always was.

Priority can be set, or some people create and use a priority of "Unassigned" at first, then select a priority later. Others don't use this for normal referrals and only select a higher priority for urgent ones.

The recommended Type at this point is "Inpatient" or "Daycare".

The recommended Status at this point is "Waiting".

Surgical Site is meant to the location of the procedure.

FOR ALBERTA ONLY:
There is a field for the aCATS Code.

FOR BC SIS PARTICIPANTS:
There is a Diagnosis field that will search as you type. The selection of the diagnosis will determine the "Target Date" which is a locked field on the right.

The other new information is the ability to record any time spans that the patient is unavailable. Use these on the right as an option, or type the unavailability details in the notes.

Linking the Waitlist to the Scheduler

You will notice that when you book an appointment, Accuro will prompt you if the patient has a waiting status on the Waitlist. The default date is blank, so press cancel to ignore the prompt.

This prompt is meant to allow you to select what kind of appointment you are booking so if it is the first consult or the procedure, you can select the date type from the prompt and it will record your appointment in the waitlist request. This is VERY important for tracking wait times in the waitlist.

What you can also do is set up status changes upon this date selection. As an example, if you are booking the first consult date, you likely want the consult status to change from "Waiting" to "Booked". You can set up a link like this:

Steps to set up Status Linking

1. Login as an Administrator
2. Open the Waitlist
3. Click on Tools -> Manage Date Types
4. Select the Date Type you want to link to a Status
5. Click the Edit (pencil) button
6. Select the Status to link it to
7. Click OK.

A recommendation as stated above would be to edit your "First Consult Date", and link it to the "Booked" status.

Back to the Main Waitlist Screen

The main waitlist screen is the same concept, but now has some better filtering so you can set up essentially different waitlist views that will effectively give you different "Waitlists".

As an example, set up views so you have a "Consult Waitlist" and a "Surgical Waitlist". Those views are set up so they show you all the requests not booked and not closed, filtered by Type. Complicated? Not once you get used to the power of being able to choose what you see and save the view for easy access later.

Here is how to set up the:

Filtering and Views in the Waitlist

At the top of the waitlist screen there are 4 selection lists. The top one is for your main "View". This is where you will select what kind of waitlist you want to see. The 3 Views we have set up for you are:

1. All Open Items — Shows all requests
2. Consult Waitlist — Shows requests with a Consult Status as Waiting
3. Surgical Waitlist — Shows requests with a Surgical Status as Waiting

Note that all of the views also by default filter out requests that have their Case State set to Closed. The Case State is a new option in the requests at the top right corner so you can mark items as closed even if they have not been completed.

Now for the Filters. The Filters allow you to further refine the view you have selected. This allows you to see just waitlist items for certain Providers, Procedures, or Complaints. You will also see the date filters to the right which you can also choose to further hone in on what you want to see. To use the date filter, pick the date you want to filter by from the drop down list, then pick the date(s). The date filter applies when you pick a date.

The reason for the addition of the Views is so that you can "save" common views of the waitlist to make it easier to flip back and forth. You can even make your own views.

Making Your Own Views

1. Open the Waitlist Screen
2. Click on “Manage Views” within the Views selection list
3. Click on the green plus to add a view, or the pencil icon to edit an existing view
4. Enter the View name at the top, then select the fields in which define your view. You will see there are lots of fields. The default is “All” which means it is including everything until you select otherwise.
5. Click Ok.

Once you add your view, it is now part of the view list at the top of the waitlist screen.

Tip: You can choose to select more than one view in the selection list. To only select one view at a time (recommended), uncheck the other view when selecting a new view.
If you RIGHT-CLICK the checkbox next to the view you want to see, it unchecks the other views. This is a nice tip and improves performance of the waitlist loading.

Reporting

The reports on the waitlist are possible in a few different ways. Firstly, you can really consider the main waitlist view as a report. It allows you to filter to see exactly what you want to see, including choosing your columns (via the icon in the upper right hand corner of the table).

It is popular to use the extract button (icon of the white page with green arrow in it) to see the information in a Microsoft Excel format. You can also click in the table, press CTRL-A to select everything, then press CTRL-C to copy, then open Excel and press CTRL-V to paste.

Another way to print is to use the print button. This gives you a more formatted print, but is not configurable.

The final report method is found in the Accuro Reporting Section (Reports menu item, Reporting). Go to the Scheduling reports and near the bottom of the list are three waitlist reports. They are also useful, and include the Wait Time reports so you can see you average wait time by procedure.