

## Wait List User Guide

Accuro's Wait List provides a single location from which you can prioritize and book appointments that there is no immediate availability for.



EMPOWERING PROVIDERS | CONNECTING PATIENTS

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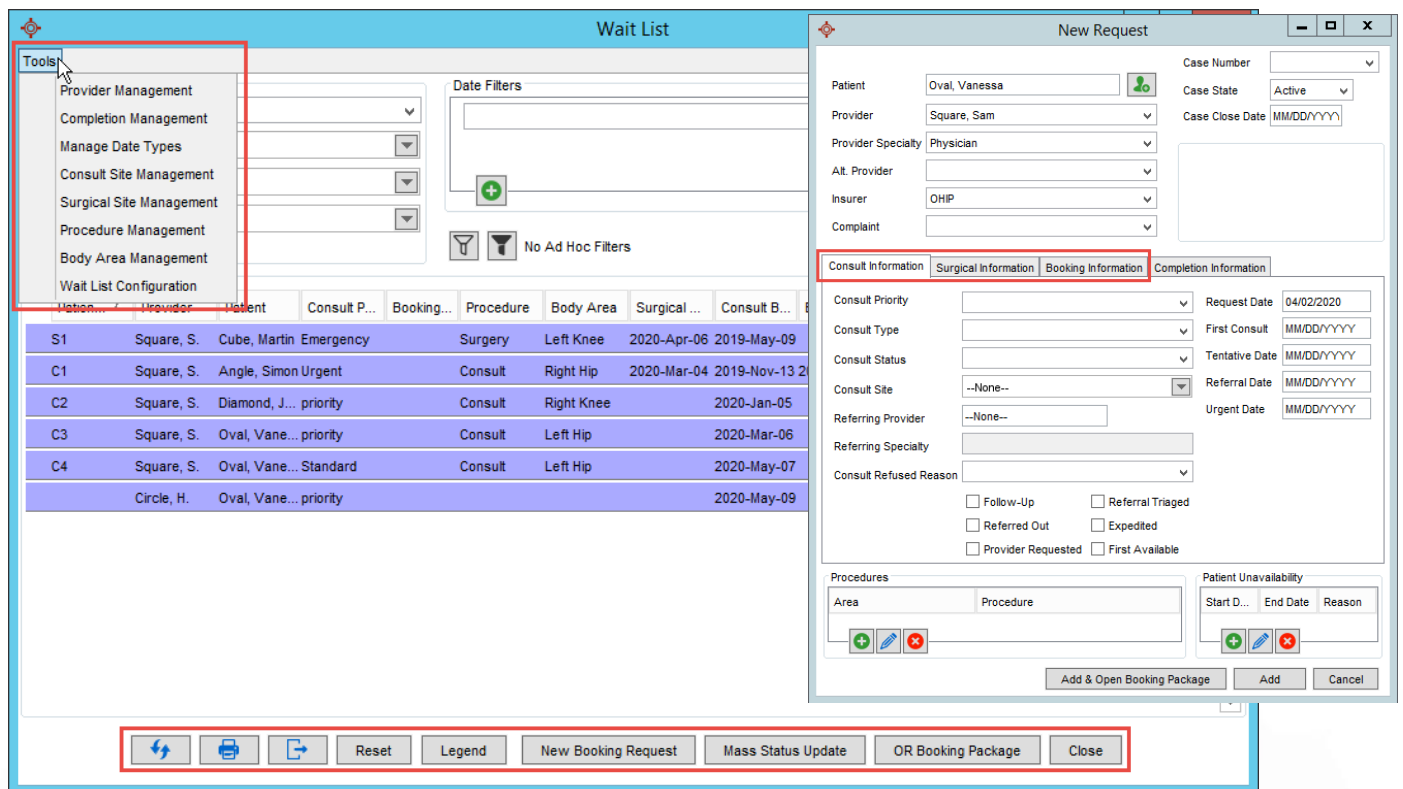
## INTRODUCTION

The Wait List is a powerful tool that can be enabled to help you organize and prioritize patients waiting for appointments and/or surgical procedures for which there is no immediate availability. When setting up the Wait List, you must complete several [Configuration](#) items before you can use it. However, to know what areas of configuration you would like to customize, you may need to know [How to Use](#) the Wait List first. It may be beneficial to read this User Guide fully before following the step-by-step Configuration so you can customize this tool in the best way for your clinic.

# CONFIGURATION

If you do not see the Wait List Tab in your Navigation Bar along the left-hand side of Accuro, it will first have to be enabled. Any Accuro user who is a System Administrator can do this by going to the Accuro Start Menu and searching Modules. Next, select Configure Modules and check off Surgical Wait List. Log out and back in to see this section appear in Accuro.

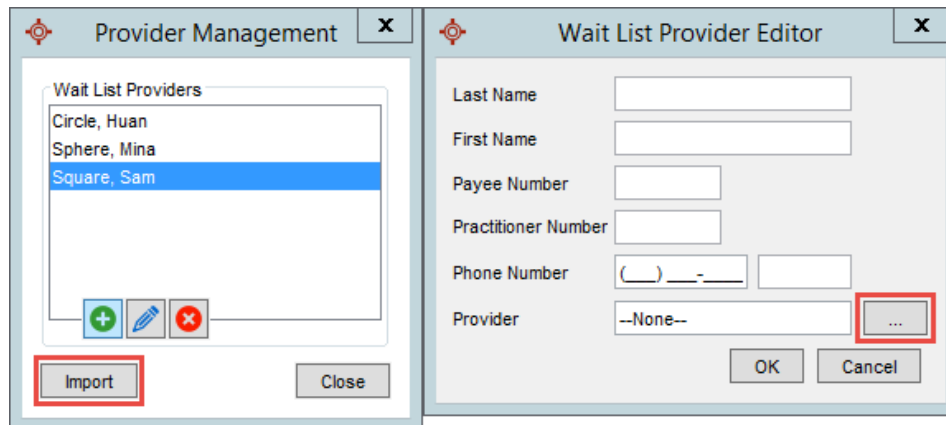
Now that the module is enabled, initial set up and clinic specific configuration must be done before the Wait List can be used. This configuration is done in three main areas. The first is in the Wait List window itself under the Tools menu. The second is in buttons along the bottom of the Wait List window, and the third area is in the individual Wait List Booking Request.



## PROVIDER MANAGEMENT

All Providers who will have patients on the Wait List must be added in the Provider Management Section.

1. Within the Wait List window, navigate to the Tools section and select Provider Management.
2. Select Import to add a new Provider to the Wait List.
3. Select the ellipses next to the Provider Field to search for and select the Provider. Enter information in any fields that are not auto populated. The Payee Number and Phone Number are optional. Adding the Payee or Practitioner Number will not affect billing
4. Click Select and then OK.
5. Repeat the above steps for every needed Provider.



This will allow patients on the Wait List to be assigned to the correct Provider.

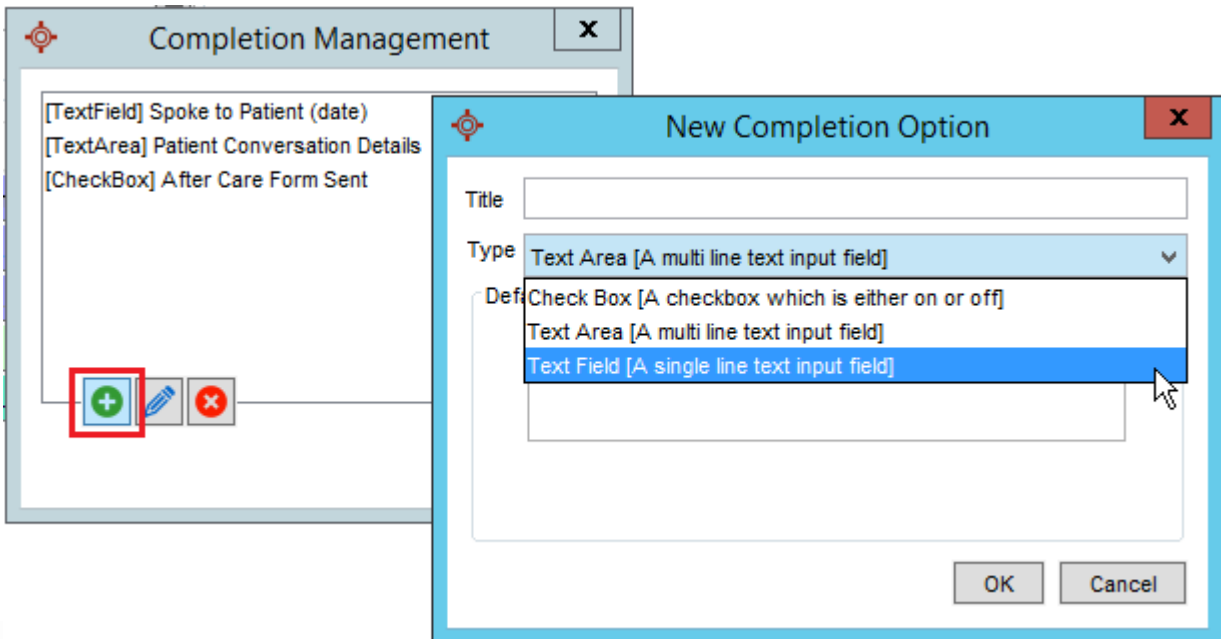
Note: Use the Add Button *only* if you need to add a provider to the Wait List that does not have an active instance in your Accuro.

## COMPLETION MANAGEMENT

In the Completion Management section, you can customize and select options for fillable fields under the Completion Tab on the Wait List booking request.

1. Navigate to the Tools menu option and select Completion Management.
2. Select the Add Button to create more fields to be available. Create fields asking for information that will be helpful once a patient has been marked as complete on the Wait List.
3. Create a Title and select a Type of either Text Field, Text Area, or Checkbox.

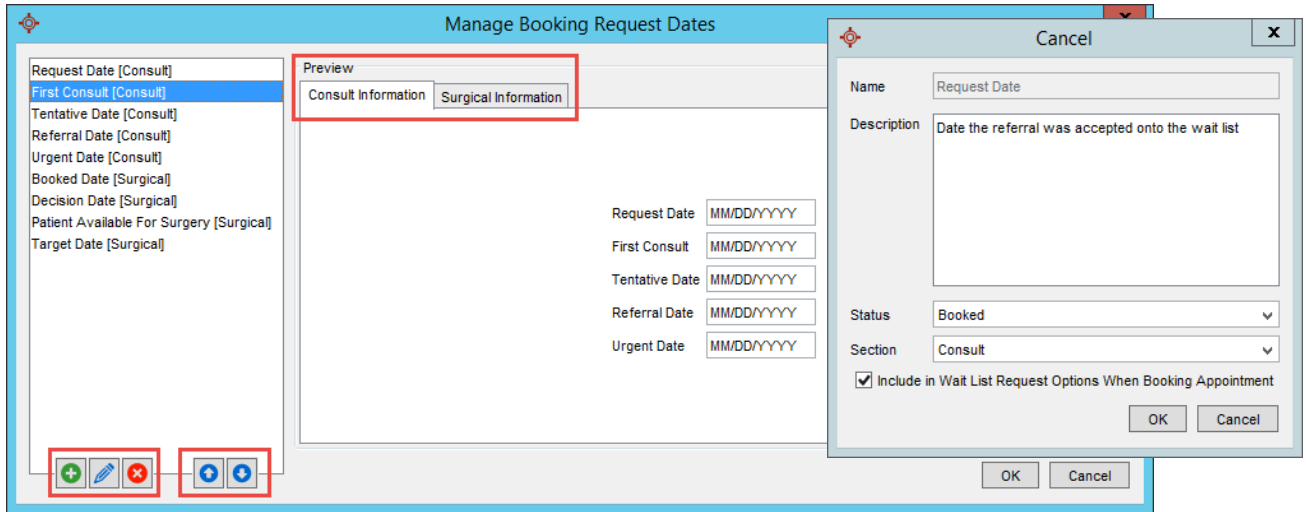
For example, if you would like to send an After-Care form to every patient after their appointment, you can create a checkbox with the title "After Care Form Sent". This will now show under the Completion Tab as an item to check off.



## MANAGE DATE TYPES

In the Manage Date Types section, all the date fields that are relevant to a patient's time on the Wait List can be changed from the defaults. This must be done by a System Administrator. Using this configuration is mandatory for reporting features.

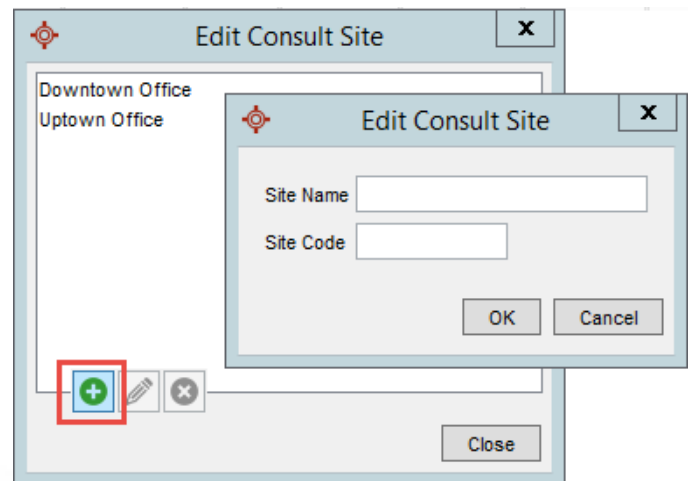
1. Navigate to the Tools section and select Manage Date Types.
2. Select the Add Button and choose any available date types from the drop down that you would like to use for your Wait List. Select OK to add.
  - a. Request Date [Consult], First Consult [Consult], Decision Date [Surgical], Booked Date [Surgical] must be used to use Data Analytics Reporting.
    - i. The square brackets indicate the tab of the Wait List Booking Request that the dates will appear under.
3. Use the Edit Button to add a description, status, or change the section you would like the date to appear in.
  - a. **Status:** When a date is entered in this field, it will update the Wait List request to the Status you choose in this configuration window. It is recommended to have the Status as Booked for both the First Consult and Booked dates.
  - b. **Section:** Which tab, Consult or Surgical, would you like this date to appear in
  - c. **Checkbox:** The "Include in Wait List Request Options when Booking Appointment" checkbox allows you to have the date field you are editing appear in the reconciliation window as shown in [Booking an Appointment for a Patient on the Wait List](#). If you do not enable this option, it will not appear on the Wait List Request window.
4. Use the Remove Button to delete any date types you do not need to capture at all.
  - Note: Not all Date Types can be deleted.
5. Use the up and down arrows to rearrange the order the dates are shown in. This can be viewed in the Consult Information and Surgical Information Preview tabs on the right side of the window.
6. Custom dates can also be added. With no date selected, click the Edit Button to add your own date type where you can customize the Name, Description, Status, and Section.



## CONSULT SITE MANAGEMENT

In the Consult Management section, all the locations where a Consult Appointment may take place must be added.

1. Navigate to the Tools section and select Consult Management.
2. Select the Add Button and fill in the site name and site code. If the code is unknown or not applicable it can be left blank.
3. Repeat for all sites a Consult appointment may need to be scheduled.

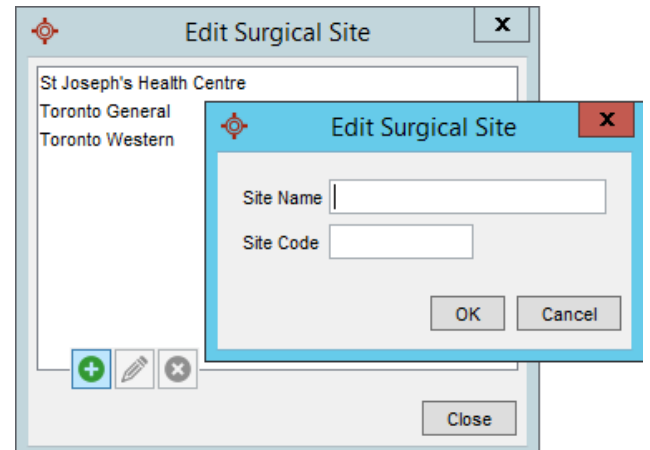




## SURGICAL MANAGEMENT

In the Surgical Management Section, all the locations where surgery may take place must be added.

1. Navigate to the Tools section and select Surgical Management.
2. Select the Add Button and fill in the site name and site code. If the code is unknown or not applicable it can be left blank.
3. Repeat for all sites a Surgical appointment may need to be scheduled.

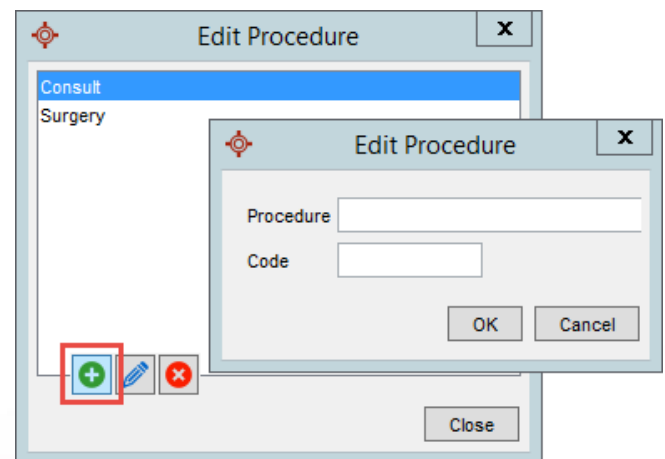


## PROCEDURE MANAGEMENT

In the Procedure Management section, all procedures a patient is on the Wait List for must be added. Using this configuration is mandatory for populating any reporting features and for calculating wait times.

1. Navigate to the Tools section and select Procedure Management.
2. Select the Add Button and fill in the Procedure Name and Procedure Code.
3. Repeat for as many procedures a patient could be waiting on.

**Trainer Tip:** Consider adding a procedure called "Consult" or "Office Visit" in order to calculate wait times for these common Consult Wait List items!

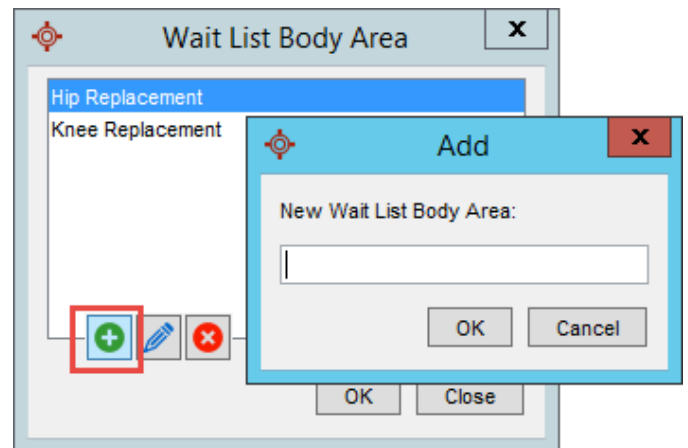


## BODY AREA MANAGEMENT

In the Body Area Management section, all the areas of the body that a procedure relates to must be added. Using this configuration is mandatory for using any reporting features.

1. Navigate to the Tools section and select Body Area Management.
2. Select the Add Button and fill in the name of the Wait List Body Area.
3. Repeat for as many areas of the body that a patient is waiting on a procedure for.

**Trainer Tip:** If this is not a feature you would like to use, but still want to utilize the reporting functionality, consider creating an option that is blank or named "N/A" or "None" that can be assigned to every request!



## WAIT LIST CONFIGURATION

In the Wait List Configuration section, defaults for Priority, Type, and Status of New Booking Requests can be chosen. If any of these sections are left blank, they will need to be manually selected for every new request.

1. Navigate to the Tools section and select Wait List Configuration.
2. Choose if you would like the Referral and Decision Dates to default to the Current Date the request is being added to the Wait List.
3. Chose the default tab you would like a New Booking Request to open to – either Consult or Surgical.

4. Under the Consult Defaults tab, choose the default from the drop down for Consult Priority, Consult Type, and Consult Status. It is recommended to choose Waiting for the Consult Status as this will prompt a Wait List Reconciliation when booking an appointment for a patient on the Wait List.
5. Under the Surgical Defaults tab, choose the default from the drop down for Surgical Priority, Surgical Type, and Surgical Status. It is recommended to choose Waiting for the Surgical Status as this will prompt a Wait List Reconciliation when booking an appointment.

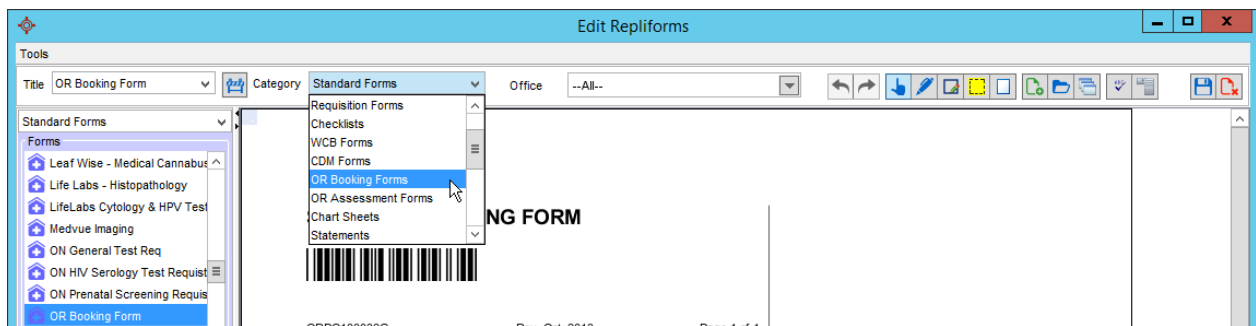
**Trainer Tip:** If you are going to use both the Consult and Surgical Wait Lists, only default the Consult Status to “Waiting” and NOT the Surgical status, otherwise the patient will be added by default to both Wait Lists!

6. Under the Appointment Booking Wait List Prompt select which procedures will trigger reconciliation against the requests. This means if there is a procedure on the Wait List that you **do not** want a reconciliation prompt for, enter them here.

## OR BOOKING PACKAGE

The OR Booking Package is an available list of configured forms that can be accessed right from the Wait List window or from within a New Booking Request. It allows you to select any required forms that may pertain to the reason the patient is being added to the Wait List. To indicate which forms should populate in the list when OR Booking Package is selected for a New Booking Request, we need to first categorize them correctly within the Form Editor.

1. Accuro Start Menu > Tools> Form Editor.
2. On the left side, double click the form you would like to add to the OR Booking Package.
3. Select OR Booking Forms or Assessment Forms from the Category drop down depending on the form you have selected.
4. Click the Save icon in the top right.
5. This form will now populate from the OR Booking Package Button. Repeat these steps for every form you would like available in either category.



**OR Booking Forms** you can only have one of. This is a standard booking form that would go with all your surgical requests and will always be the first page of the OR Booking Package. You **MUST** choose an OR Booking form or else you can't proceed.

**OR Assessment Forms** are optional forms and you can choose more than one. Examples are a consent form, special equipment form, or a BMI form. You may not need these for all patients or procedures.

Please also see the Wait List – Forms Component Names companion document for further instruction on how to have information from the Wait List Booking Request automatically populate into the OR Booking forms.

## NEW REQUEST MANAGEMENT

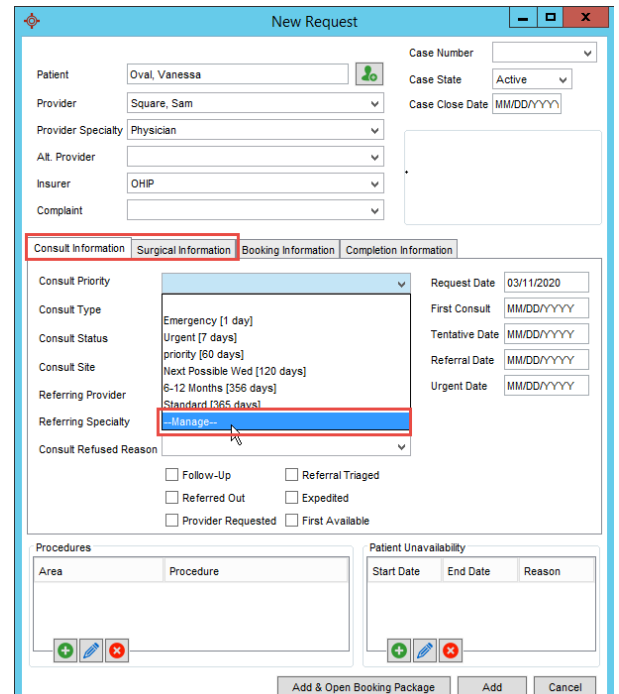
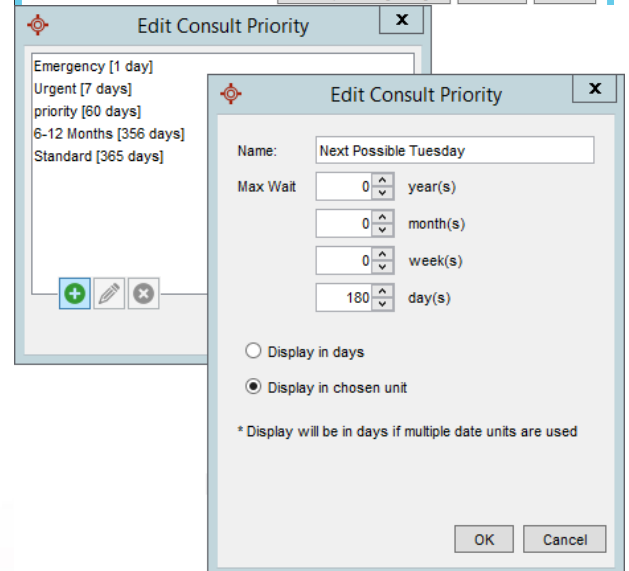
Within the [New Booking Request](#) window, there are also several fields both on the Consult and Surgical tabs, that need to be configured to suit your office needs.

Select one of the drop downs to see the -Manage- option. Select this to create new Priorities, Types, and Statuses that you would like to be part of the request.

In this example, we are adding a new Consult Priority to the Consult Priority drop down by selecting - Manage- in the Consult Priority drop down and clicking the Add Button.

**Trainer Tip:** When creating a new priority, you must input a Max Wait time, or everything will be listed as overdue!

Repeat this for every option you would like available in the drop down, and for every drop down in the New Request Window, Consult Information and Surgical Information tab. The drop downs that can be customized are:

### New Request Window

- Complaint

### Consult Information

- Consult Priority
- Consult Type
- Consult Status
- Consult Refused Reason

### Surgical Information

- Surgical Priority
- Surgical Type
- Surgical Status
- Surgical Refused Reason

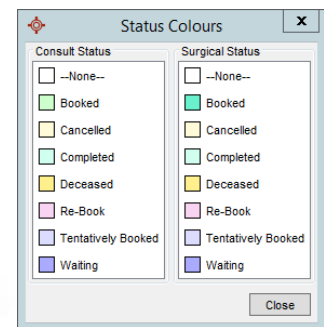
Your office will decide how many or how few options and customizations you would like to use in these drop downs based on office needs.

**Trainer Tip:** Many clinics like to view their Wait List by Consult Types. You can add every type of consult a patient may be waiting for using the above instructions. Then, using [Views and Customizations](#), you can view a list by each type!

## LEGEND CONFIGURATION

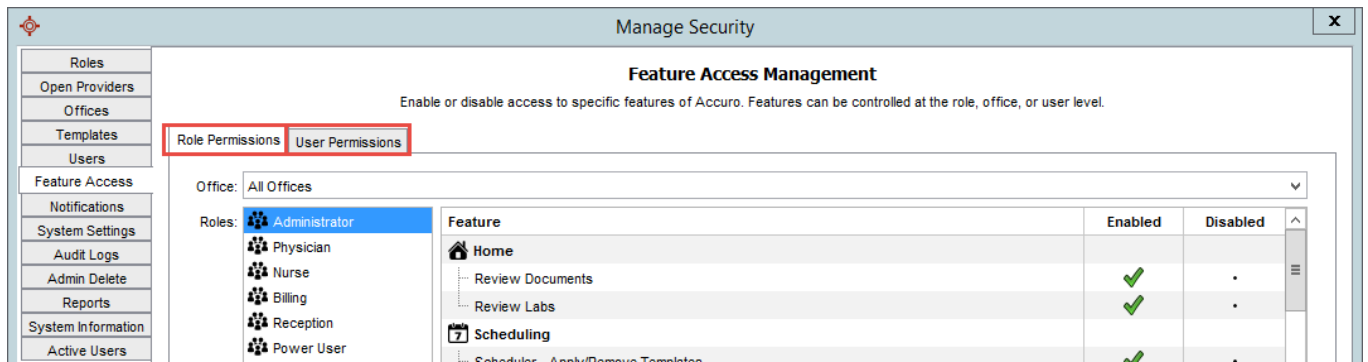
The Legend, available at the bottom of the main Wait List window, is where you can change the color of items on the Wait List by status.

1. Click on the name of the Status you would like to change the color of. This will open a new window.
2. Choose a color under the Swatches Tab or use the HSV, HSL, RGB, or CMYK to customize your own.



## FEATURE ACCESS

A System Administrator must choose which features each User or Role has access to use or configure with the Wait List. Feature Access can be configured in Manage Security under Feature Access Management. (Accuro Start Menu > Users > Manage Security > Feature Access)



If you would like the access to be the same **per role**:

1. Select the Role Permissions tab.
2. Click to highlight the Role you would like to configure.
3. Check in which features you would like this Role to have.

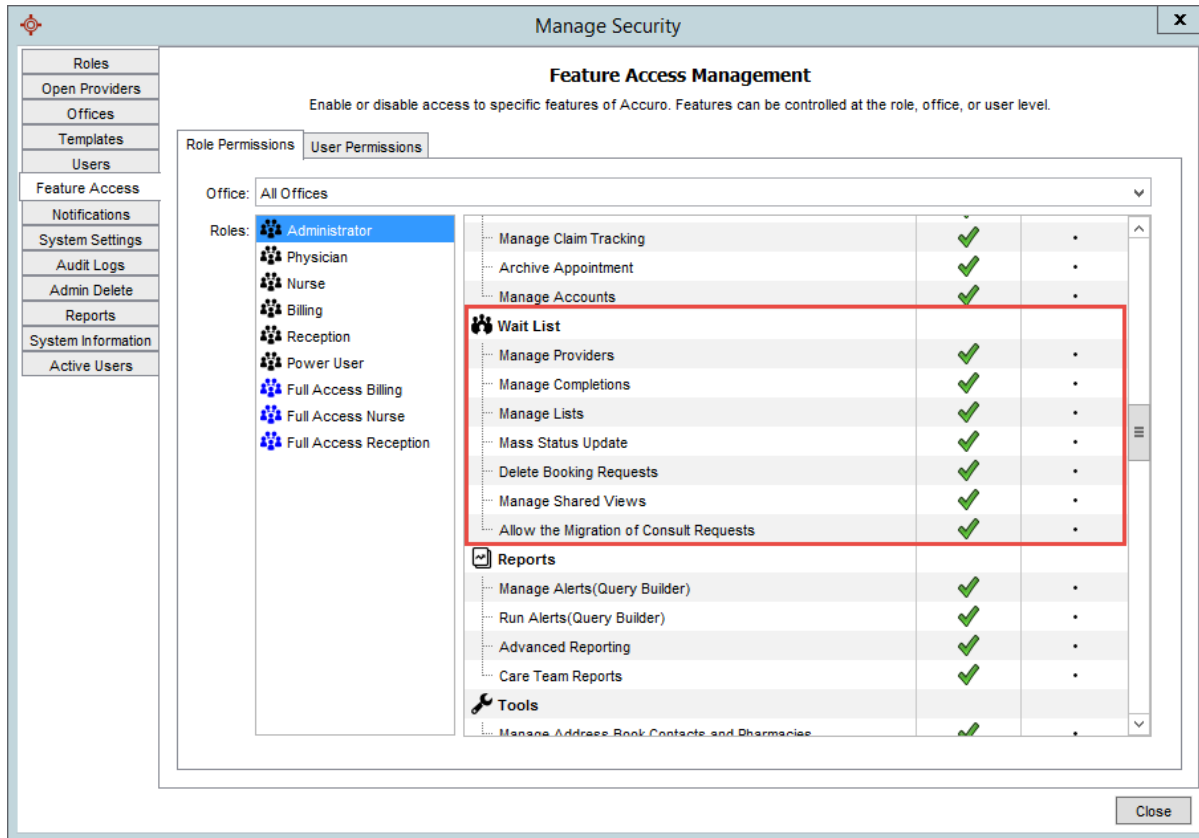
If you would like the access to be the same **per user**:

1. Select the User Permissions tab.
2. Select the User you would like to configure from the dropdown.
3. Check in which features would would like this User to have.

For further information on Roles, Permissions and Feature Access please locate the Accuro User Guide in Accuro under the Start Menu. Click Help to bring up the Accuro User Guide and search for the topic you would like more information on.



The following features can be enabled or disabled for each Role or User:



**Manage Provider:** Determines access to [Provider Management](#).

**Manage Completions:** Determines access to [Completion Management](#).

**Manage Lists:** Determines access to the manage the Priority, Type, and Status lists within a [New Booking Request](#)

**Mass Status Update:** Determines access to be able to [mass status update](#) all booking requests

**Delete Booking Requests:** Determines the ability to booking delete requests

**Manage Shared Views:** Determines access to be able to [share views](#)

**Allow the Migration of Consult Requests:** This is a legacy feature access that allowed list migration before the functionality of the Wait List was updated



## HOW TO USE THE WAIT LIST

Now that you have finished all your Wait List configuration, you can start adding patients!

A typical workflow for using the Wait List is:

1. Referral is Received
2. Patient is added to Accuro
3. Referral is filed to their chart
4. Referral is triaged and either rejected or accepted and added to the Wait List
5. Patient has appointment booked
6. The case is either set to closed or the patient is moved to the Surgical Wait List
7. Surgery is scheduled
8. After surgery, the completion items are done, and the case is set to closed.

Please keep in mind that you can decide to use the Wait List differently and may choose to skip or add steps as your office deems fit.

## RECEIVING A REFERRAL

Once a referral is received into the documents section:

1. If the patient does not already exist in Accuro, add the Patient into Accuro using F6
2. File the document to the patient chart or send to a Provider to review.
3. If you didn't just add the Patient to Accuro, click F4 and navigate to the Wait List History tab to confirm that the patient is not already on the Wait List for the same reason.
4. If the referral is accepted the patient can be added to the Wait List using the steps below.

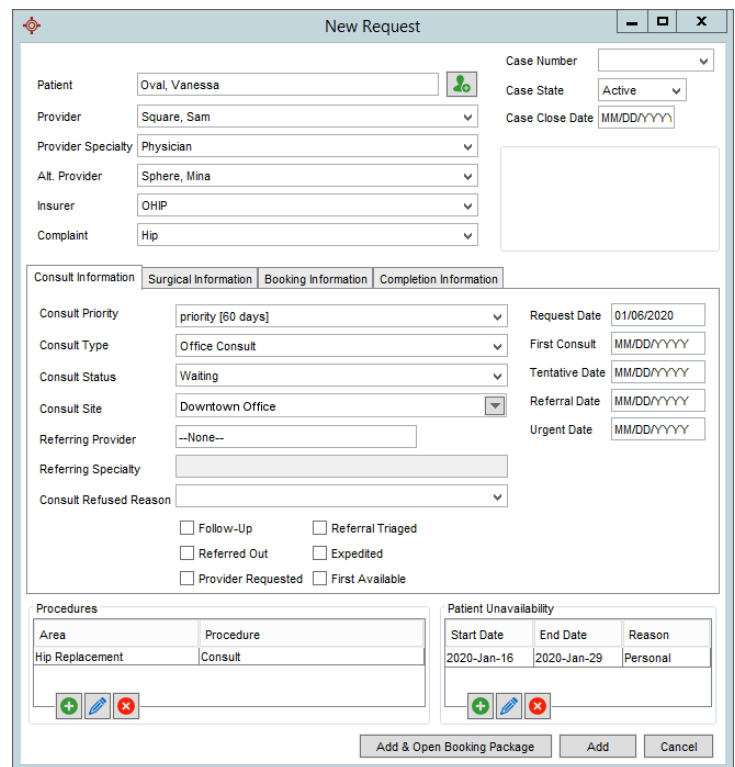
## ADDING A NEW REQUEST TO THE WAIT LIST

A request can be added to the Wait List by opening the Wait List window and selecting New Booking Request, or by using **CTRL + L** anywhere in Accuro.

Fill in all relevant fields and drop downs specific to your clinic Wait List needs. For reporting purposes, the following fields should always be used:

- Priority Date
- Request Date
- Referral Date
- Procedures: Area and Procedure
- Patient Unavailability
- Complaint
- Status: Waiting

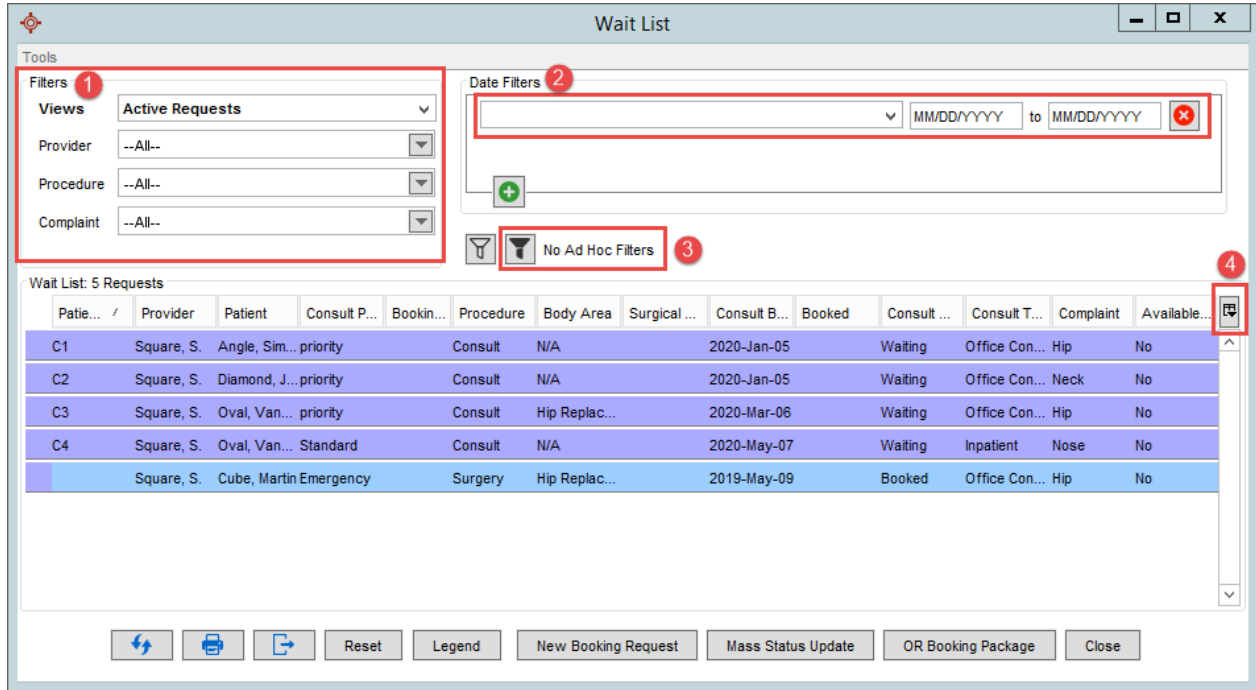
If the patient knows they will not be available for a certain period, you can add a date range for Patient Unavailability. By entering this information, the request will not be visible when using the filter 'Patient Available for Surgery' in the main Wait List date filter.



Click 'Add' to save the information entered and finish adding the patient to the Wait List.

## WAIT LIST VIEWS AND CUSTOMIZATION

Now that there are patient requests on your Wait List, you can customize how you view the list.

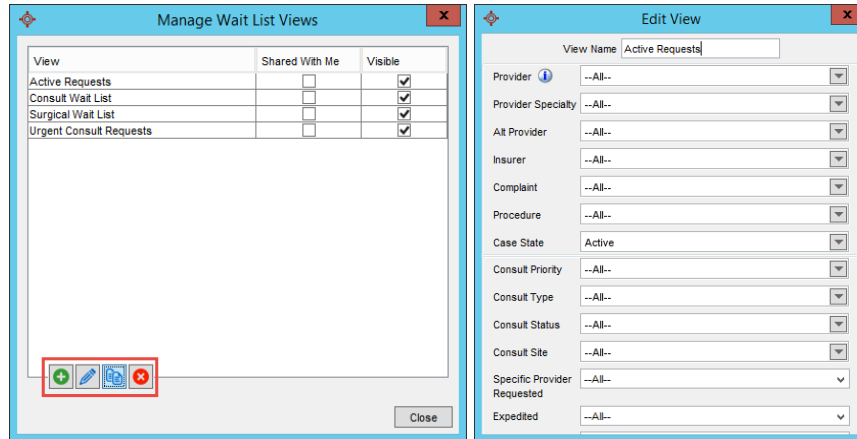


The screenshot shows the 'Wait List' window with the following components:

- Filters (1):** A sidebar containing dropdown menus for Views (set to 'Active Requests'), Provider (set to '--All--'), Procedure (set to '--All--'), and Complaint (set to '--All--').
- Date Filters (2):** A section with a date range input field (MM/DD/YYYY to MM/DD/YYYY) and a '+' icon to add more filters.
- No Ad Hoc Filters (3):** A button with a funnel icon and the text 'No Ad Hoc Filters'.
- Table (4):** A table titled 'Wait List: 5 Requests' with columns: Patie..., Provider, Patient, Consult P..., Bookin..., Procedure, Body Area, Surgical..., Consult B..., Booked, Consult..., Consult T..., Complaint, and Available... The table contains 5 rows of patient data.

Patie...	Provider	Patient	Consult P...	Bookin...	Procedure	Body Area	Surgical ...	Consult B...	Booked	Consult ...	Consult T...	Complaint	Available...
C1	Square, S.	Angle, Sim... priority			Consult	N/A		2020-Jan-05	Waiting	Office Con...	Hip	No	
C2	Square, S.	Diamond, J... priority			Consult	N/A		2020-Jan-05	Waiting	Office Con...	Neck	No	
C3	Square, S.	Oval, Van... priority			Consult	Hip Replac...		2020-Mar-06	Waiting	Office Con...	Hip	No	
C4	Square, S.	Oval, Van... Standard			Consult	N/A		2020-May-07	Waiting	Inpatient	Nose	No	
	Square, S.	Cube, Martin Emergency			Surgery	Hip Replac...		2019-May-09	Booked	Office Con...	Hip	No	

1. **Filters:** The filters here allow you to see the Wait List requests by View, Status, Provider, Procedure, and Complaint, or any combination of the four that you would like to see.
  - a. **Views** allow you to customize, per user, how you would like to see the Wait List and save it for future use. You may want a separate view for each type of request that you book on the Scheduler (ie. Shoulder Consults or Hip Consults). Navigate to the Views dropdown and select Manage. This will bring up the Manage Wait List Views Window. Where you can create, edit or copy Views.



Using the dropdowns, select whichever options you would like to see on your custom Wait List View.

**Trainer Tip:** Views can be shared between users within the same database. When creating a view, select which office you would like to share your view with by using the Share to Office dropdown! Views that have been shared with you will be indicated by the check box next to the View name!

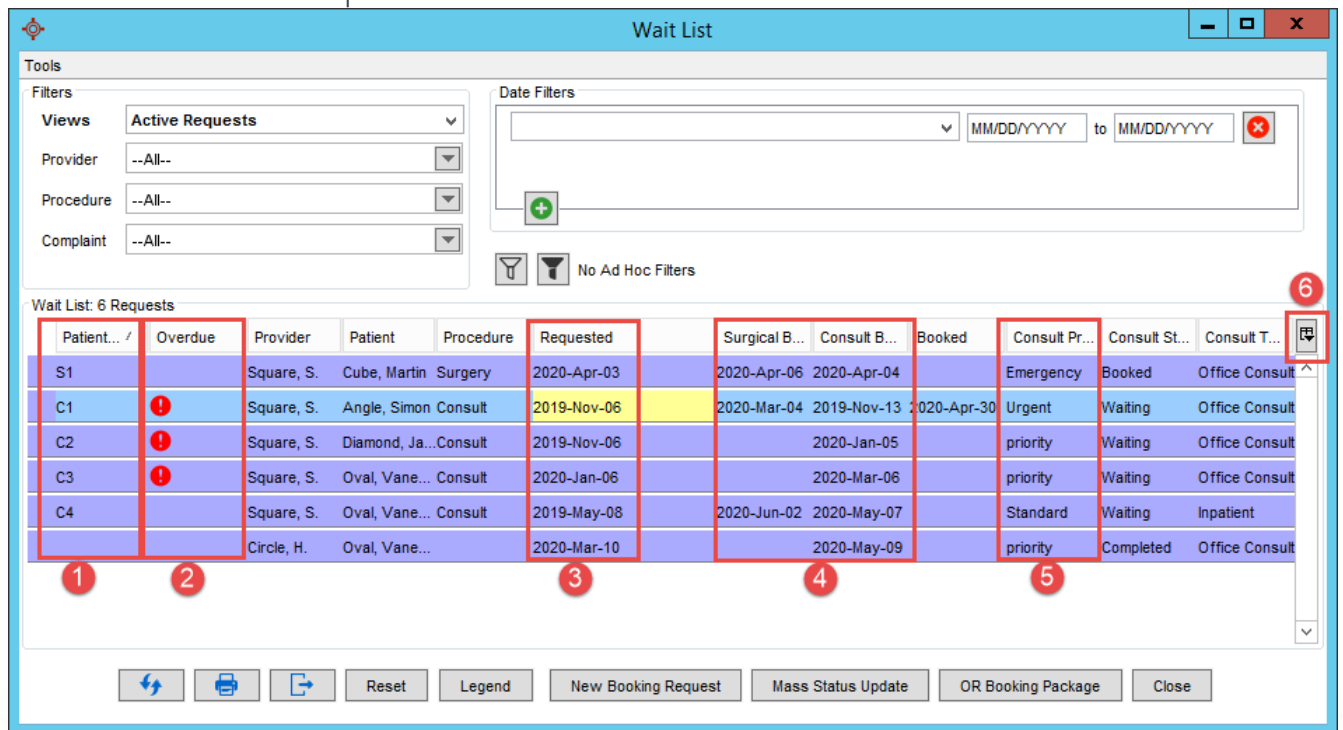
- b. **Provider** allows you to view requests by the the Provider that is on the request.
  - c. **Procedure** allows you to view only selected Procedures a patient is waiting for.
  - d. **Complaint** allows you to view requests by the Complaint listed on the request.
2. **Date Filters:** The Date Filters allow you to choose which type of date you would like to filter the requests by and between which two dates. For example, if you want to find all requests in the last 6 months you would choose 'Request Date' and enter in the date 6 months ago to today.
3. **Ad Hoc Filters:** The Ad Hoc Filters allow you to see a list of patients by a very specific option you might use on the fly instead of saving an entire View for the future. For example, Provider Specialty. Remove this Ad Hoc filter by click on the outline to the left of the black (filled in) Filter Button.
4. **Column Options Button:** The Column Options Button allows you to choose columns you would like to see in your main Wait List view. For example, if your office does not use the Available to be Canceled option, you can remove it from view. The columns you choose to see are applied to the currently selected View from the Views dropdown. You

may want to set the columns for each view that you have created. For example, if you have your Consult Wait List view selected you will likely not need to see the Surgical date fields so you would deselect those column options.

**Trainer Tip:** Create an Urgent Consult Requests View! In the Views dropdown, select Manage. Click on the Consult Wait List view and then select the Copy Button. Change the Name of your new view to Urgent Consult Requests. Next, in the Consult Priority drop down choose Urgent and Emergency and press OK to save your view. This View will now only show requests with those priorities!

## SORTING WAIT LIST REQUESTS

Now that there are patient requests on your Wait List, you need will need to sort and analyze them to determine which patient should be booked next.



Patient...	Overdue	Provider	Patient	Procedure	Requested	Surgical B...	Consult B...	Booked	Consult Pr...	Consult St...	Consult T...
S1		Square, S.	Cube, Martin	Surgery	2020-Apr-03	2020-Apr-06	2020-Apr-04		Emergency	Booked	Office Consult
C1	!	Square, S.	Angle, Simon	Consult	2019-Nov-06	2020-Mar-04	2019-Nov-13	2020-Apr-30	Urgent	Waiting	Office Consult
C2	!	Square, S.	Diamond, Ja...	Consult	2019-Nov-06		2020-Jan-05		priority	Waiting	Office Consult
C3	!	Square, S.	Oval, Vane...	Consult	2020-Jan-06		2020-Mar-06		priority	Waiting	Office Consult
C4		Square, S.	Oval, Vane...	Consult	2019-May-08	2020-Jun-02	2020-May-07		Standard	Waiting	Inpatient
		Circle, H.	Oval, Vane...		2020-Mar-10		2020-May-09		priority	Completed	Office Consult

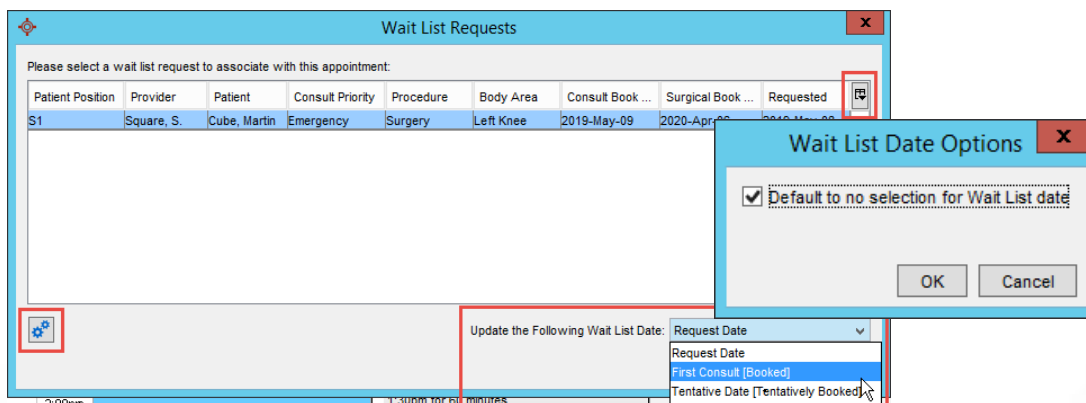
1. **Patient Position:** Patient Position will show the order in which a patient should be booked by on each the Surgical (S) or Consult (C) Wait List. This is calculated based on the Requested Date, Priority and how long total the patient can wait for. Accuro takes the requested date as the date the patient was added to the Wait List and then adds the number of days we said they could wait based on their Priority on the Wait List to calculate a "Booked By" date. It will then order the patients on your list according to this. However, the patients with shorter waiting times (Urgent (7 days) vs. Regular (180 days) will have a higher patient position.
2. **Overdue flag:** This icon will show if a patient is past the date you had indicated they should have their appointment or surgery booked by.
3. **Requested Date:** This will show the date that they were entered on the Wait List
4. **Consult and Surgical Book by:** This will show the date the request must be booked by. This date is calculated by taking the Request Date and adding the max number of days as indicated by the Priority that we said the patient can wait. For example, if a patient's Request date was January 1 and the Priority indicated a max wait time of 7 days, the Booked By date would be Jan 8.
5. **Patient Priority:** This will show the Priority you chose for this patient request.
6. **Column Option Selector:** This window's columns can be configured with the Column Options Button in the top right corner that allows you to view only columns that are relevant to what you want to see. These selections can be configured per Wait List view selected.
7. **Other Customizable Options:** Click the column heading to sort by that column and click that heading again to reverse the order. You will be able to tell by the triangle that appears next to the name which order, ascending or descending, you are viewing.

Using options 1-4 and any other stipulations you have in your office, you can decide which patient should be booked next.

## BOOKING AN APPOINTMENT FOR A PATIENT ON THE WAIT LIST

Once you know you are going to schedule an appointment from the Wait List, create an appointment for the patient in Accuro.

1. You can quickly move to the Scheduler and select the patient you want to book by right clicking on the patient in the Wait List window and select Book Patient.
2. Create an appointment on the scheduler using your standard workflow and fill in the Appointment Details, then press 'OK' to save.
3. If the patient has a Status of Waiting on a Wait List, the Wait List Requests window will appear prompting you to reconcile a request from the Wait List with the appointment.
4. This window's columns can be configured with the Column Options Button in the top right corner that allows you to view only columns that are relevant to what you want to see.
5. Click to highlight the correct request and select which configured date you would like to be automatically updated. If they are being booked for a Consult, it is recommended to update the First Consult date and if they are booked for a Surgery, it is recommended to update the Booked Date as these are needed for reporting. This is where the dates you configured in [Manage Date Types](#) begin to impact the Wait List requests.
6. In the bottom left of the Wait List Requests window, there is a Configure Button available. This Configure Button will give you the option to have the Wait List Date drop down default to have no selection, rather than defaulting to another option.
7. Now, the patient has the status associated with the date you selected, and the corresponding date field has been populated with the date of the appointment. This effectively removes the patient from your Wait List view.





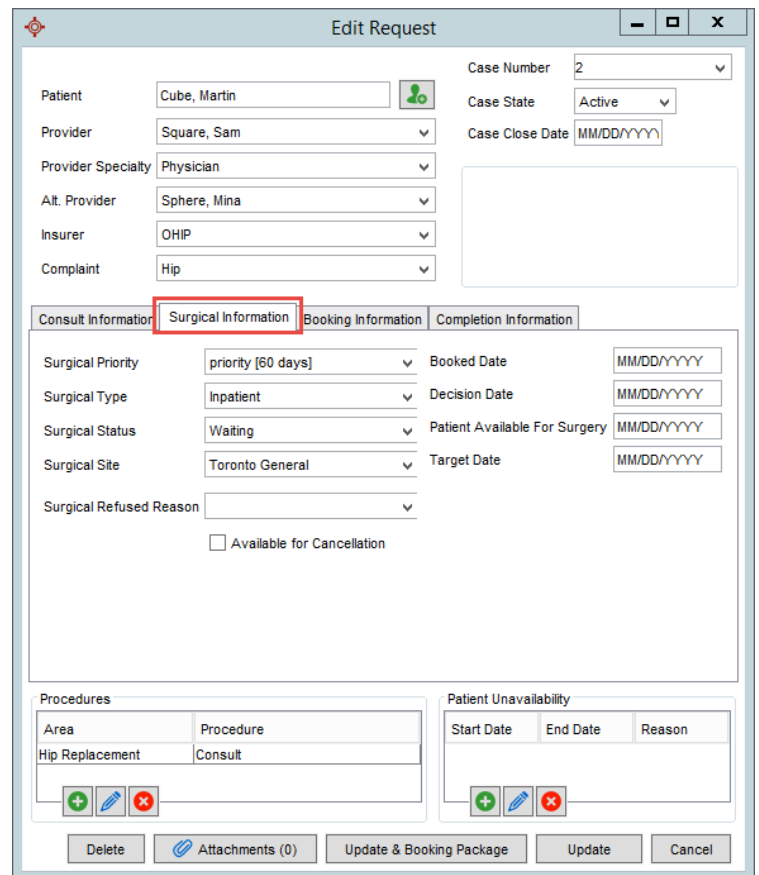
## MOVING A PATIENT TO SURGICAL WAIT LIST

After the first consult appointment, the Wait List request will either be [completed](#), or the patient will be moved to the Surgical Wait List. The information can be filled out in the patient’s Surgical Information Tab of the same Wait List Booking Request. Once the information and needed dates are filled out on this tab, the patient will now show on the Surgical Wait List.

Fill in all relevant fields and drop downs to your office. For reporting purposes, the following fields should always be used:

- Decision Date
- Status: Waiting

Once the surgery is ready to be booked, follow the same instructions in [Booking an Appointment for a Patient on the Wait List](#)



**Edit Request**

Patient: Cube, Martin

Provider: Square, Sam

Provider Specialty: Physician

Alt. Provider: Sphere, Mina

Insurer: OHIP

Complaint: Hip

Case Number: 2

Case State: Active

Case Close Date: MM/DD/YYYY

**Surgical Information** | Consult Information | Booking Information | Completion Information

Surgical Priority: priority [60 days]

Surgical Type: Inpatient

Surgical Status: Waiting

Surgical Site: Toronto General

Surgical Refused Reason:

Available for Cancellation

Booked Date: MM/DD/YYYY

Decision Date: MM/DD/YYYY

Patient Available For Surgery: MM/DD/YYYY

Target Date: MM/DD/YYYY

**Procedures**

Area	Procedure
Hip Replacement	Consult

**Patient Unavailability**

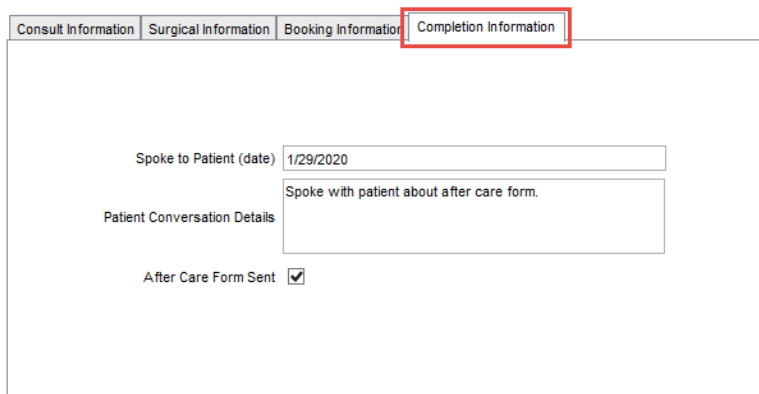
Start Date	End Date	Reason

Buttons: Delete, Attachments (0), Update & Booking Package, Update, Cancel



## COMPLETION ITEMS

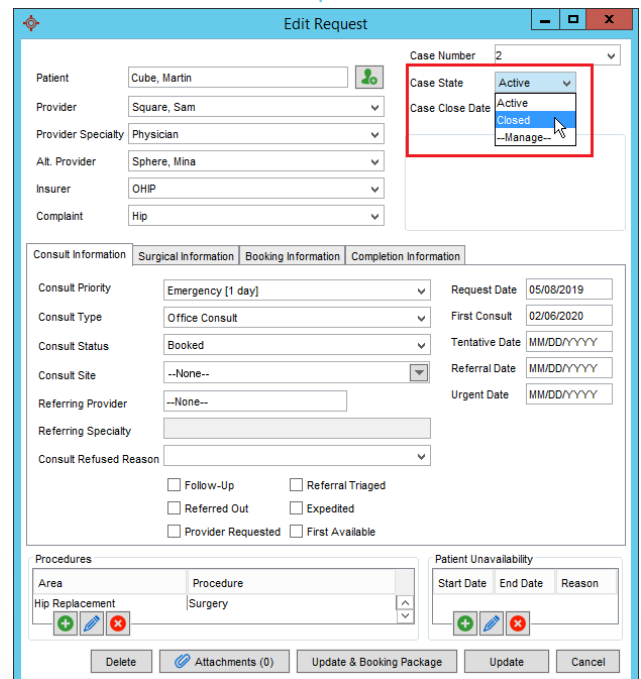
Once surgery has been completed, and the booking request is ready to be closed in Accuro, it is time to do the completion items that were configured for your Office. In this example, the clinic is confirming that they spoke to the patient and sent them their After-Care Form.



## SETTING CASE STATE TO CLOSED

Now that this patient has gone through the Wait List, it is time to change the Case State to Closed. This is an important step as otherwise there will be no difference between Completed and Active Wait List requests. You can do this on a case by case basis (see below) or jump to the next section [Mass Status Update](#).

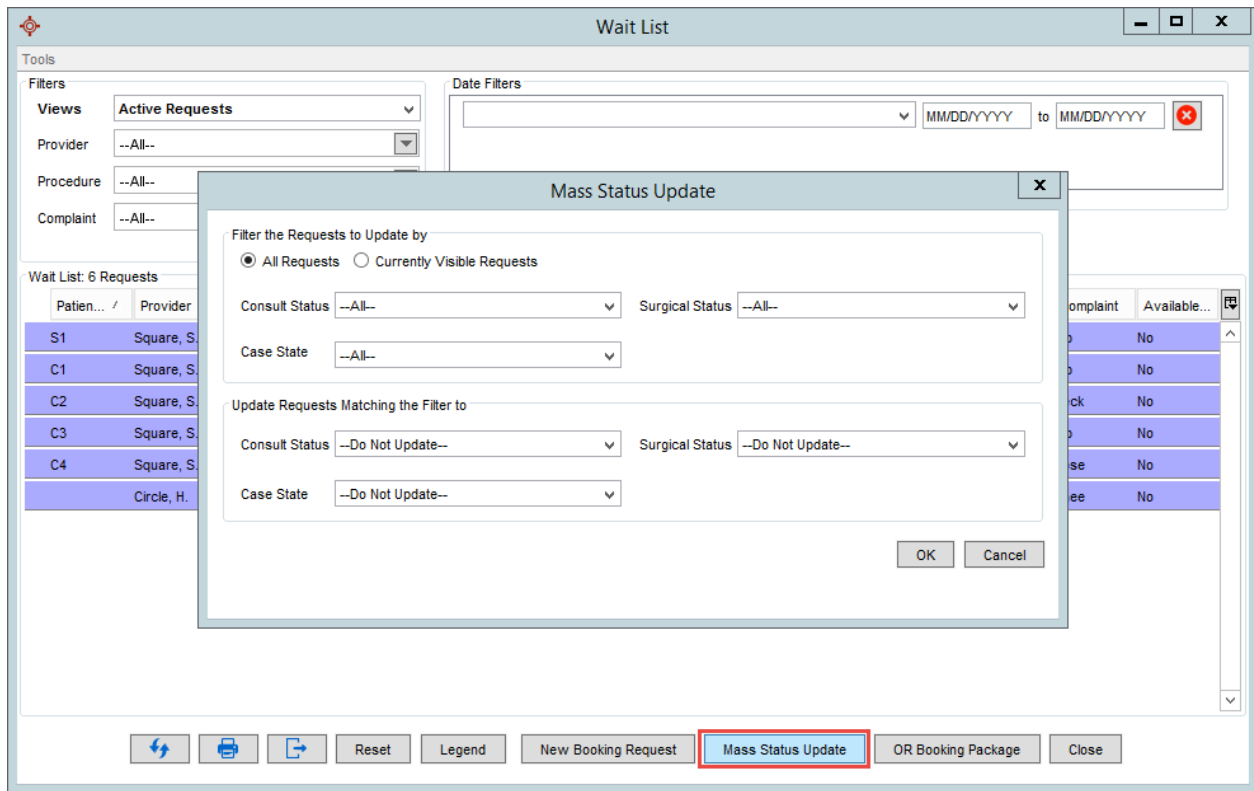
1. Select Closed from the drop down in the top right corner.
2. Select Update.



## MASS STATUS UPDATE

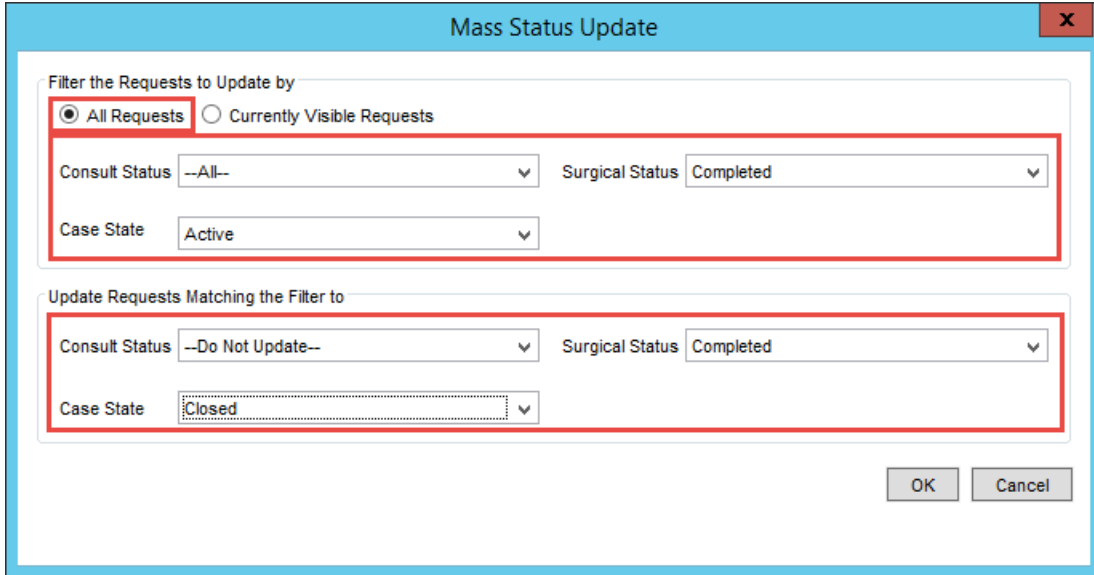
The Wait List allows for the patient statuses on the Wait List to be updated all at one time.

Select the Mass Status Update button at the bottom of the Wait List Window.



This will allow you to select the type of requests to be updated and what you would like to update them to.

In the below example, we want to change all Surgical Requests that are listed as Completed, but were accidentally left as Active, to Completed and Closed.



**Mass Status Update**

Filter the Requests to Update by

All Requests  Currently Visible Requests

Consult Status --All-- Surgical Status Completed

Case State Active

Update Requests Matching the Filter to

Consult Status --Do Not Update-- Surgical Status Completed

Case State Closed

OK Cancel

This will Mass Update the status of all the patients that fit the chosen parameters.

## REPORTING

Reporting on the Wait List is possible in multiple ways. If the recommended configurations in this User Guide were followed, all reporting options are available.

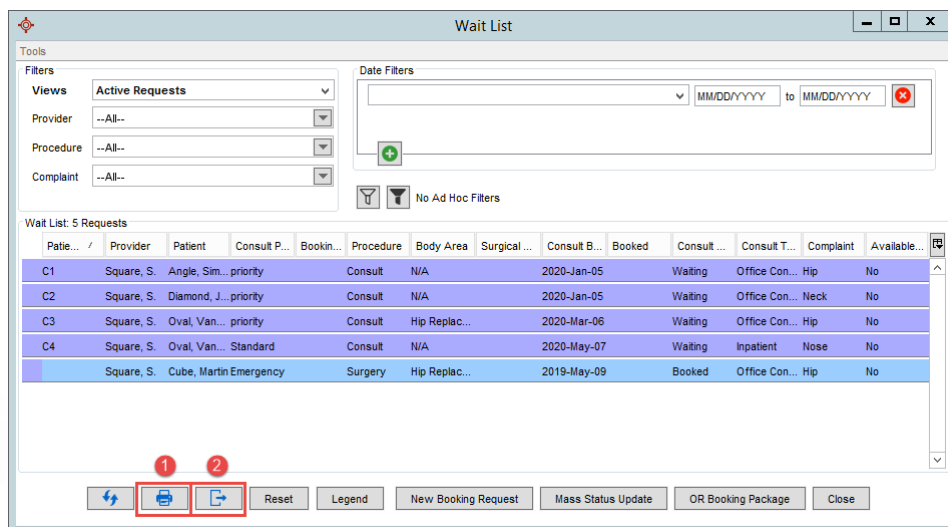
### WAIT LIST MAIN SCREEN REPORTING

You can consider the main Wait List view as a report. It allows you to filter to see exactly what you want, including choosing your columns with the Column Options Button in the upper right-hand corner of the table.

Please see the [Wait List Views](#) section for instructions on filtering your requests.

Once you have a desired view of the Wait List, it can be:

1. Printed using the button shown. The print version is formatted but cannot be configured or changed.
2. Exported to CSV. You can choose what information you would like to export. Remember that this export will contain Patient Health Information.



## ACCURO REPORTS

Another reporting method is found in the Accuro Reporting Section. Accuro Start Menu > Reports > Reports. Under the Scheduling Reports, there are three Wait List reports available. For this reporting to have accurate data, the [Procedure](#) and [Body Area](#) fields on a Wait List request must be used.

### Wait List:

**Step 1:** Select the Provider(s) from the list in the top left corner.

**Step 2:** Select the report view order from the dropdown list below.

Consult Priority ▼

This report will show you a list of all patients on a specific Providers Wait List.

### Wait List Consult Wait Times:

This report will pull the average wait time of the Consult Wait List in days.

**Step 1:** Select the Provider(s) from the list in the top left corner.

**Step 2:** Select the site name(s) from the list below or select 'All Sites'.

Downtown Office  All Sites  
 Uptown Office

**Step 3:** Select the procedure(s) from the list below or select 'All Procedures'.

Consult  All Procedures  
 Surgery

**Step 4:** Select the request date(s) below.

Starting  Double-click to select a date.  
 Ending  Double-click to select a date.

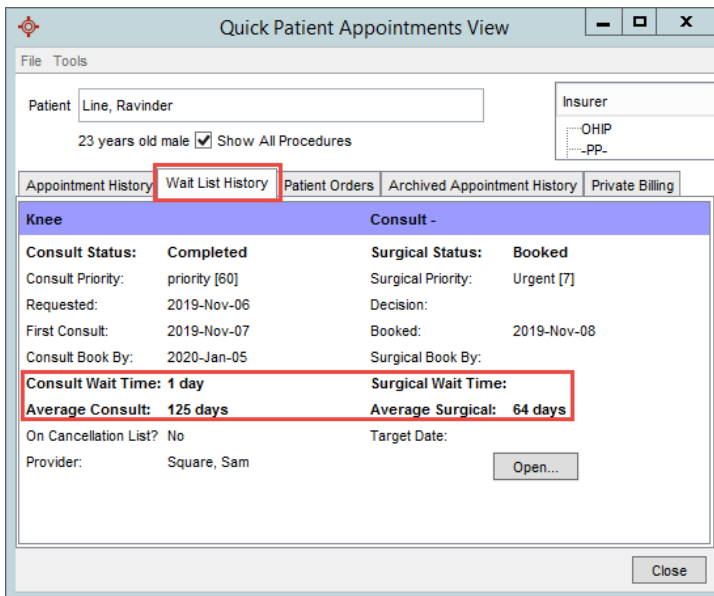
**Step 5:** Select the first consult date(s) below.

Starting  Double-click to select a date.  
 Ending  Double-click to select a date.


### Wait List Surgical Wait Times:

This report will show a list of patients the Provider has seen and how long their appointments were in minutes.

**Trainer Tip:** This information is also visible in the Quick Patient History Window. When you have a patient selected in Accuro, press F4 on your keyboard and choose the Wait List History tab!



**Step 1:** Select Provider(s) from the list in the top left corner.  
OR  
Select the Provider Type(s) to report on.

 Physician

**Step 2:** Select the Date Range for the report. (MM/DD/YYYY for no date)  
Starting from  ending at

**Step 3:** Select the report grouping option from the dropdown list below

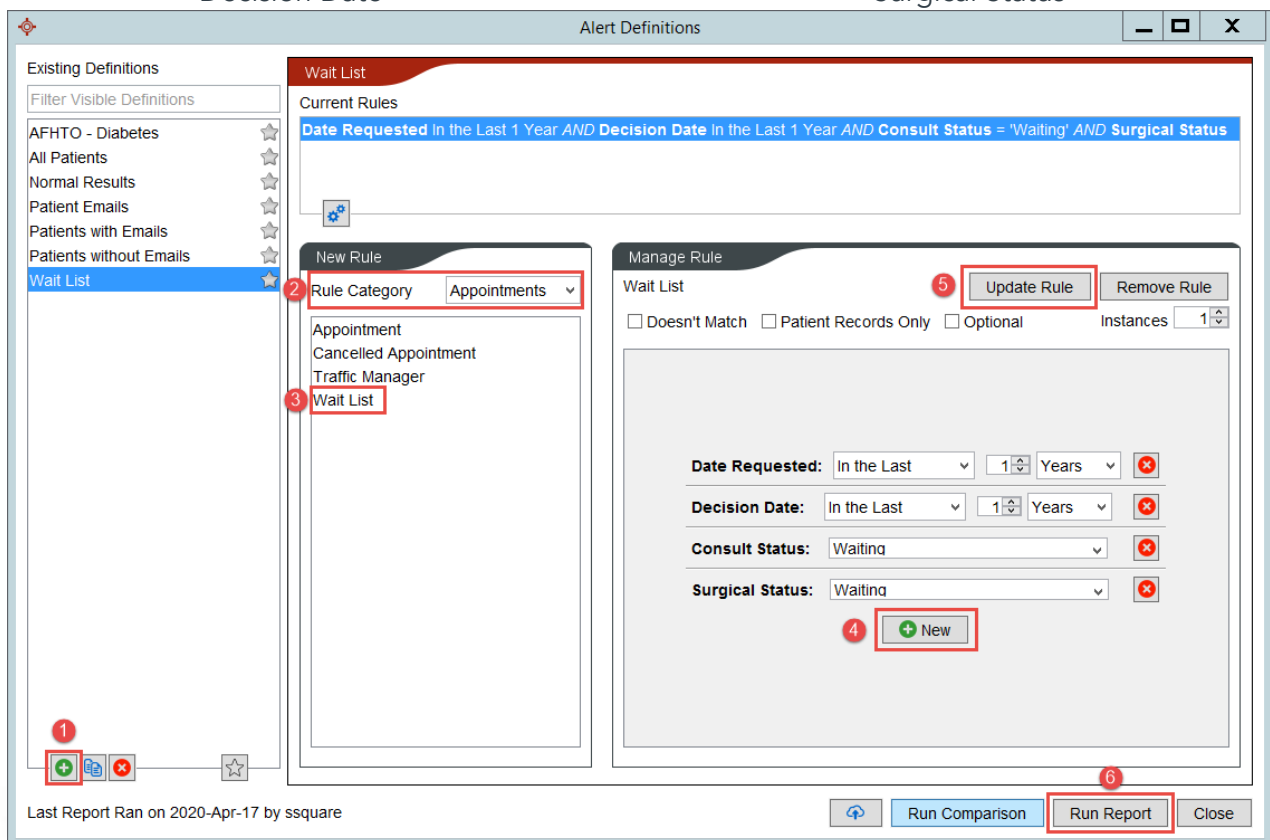
**Step 4:** Select the level of details to report on.  
 Detailed  Summary Only

Here you can see the specific patient's status and wait time, but you can also see the Average Consult and Surgical Wait Time for the entire office.

## QUERY BUILDER

The Query Builder is a tool that allows data in Accuro to be queried into a report. This can be accessed in the Accuro Start Menu > Reports > Query Builder.

1. Create a new Query with the Add Button.
2. Navigate to Rule Category and select Appointments from the dropdown.
3. Click to highlight the Wait List to create a New Rule.
4. Under the Manage Rule section, select +New to add constraints to your rule. The constraints available for the Wait List rule are:
  - Date Requested
  - Consult Status
  - Decision Date
  - Surgical Status



The screenshot displays the 'Alert Definitions' window with the 'Wait List' rule selected. The interface is divided into several sections:

- Existing Definitions:** A list on the left with 'Wait List' highlighted. A red circle '1' is next to the '+ New' button at the bottom.
- Current Rules:** Shows the active rule: 'Date Requested In the Last 1 Year AND Decision Date in the Last 1 Year AND Consult Status = "Waiting" AND Surgical Status'. A red circle '2' is next to the 'Rule Category' dropdown.
- New Rule:** A dropdown menu for 'Rule Category' is set to 'Appointments'. 'Wait List' is selected and highlighted with a red circle '3'.
- Manage Rule:** Contains options for 'Update Rule' (red circle '5'), 'Remove Rule', and 'Instances' (set to 1). Below are four constraint fields:
  - Date Requested:** In the Last 1 Years
  - Decision Date:** In the Last 1 Years
  - Consult Status:** Waiting
  - Surgical Status:** Waiting
 A '+ New' button is highlighted with a red circle '4'.
- Bottom:** A 'Run Report' button is highlighted with a red circle '6'. The status bar shows 'Last Report Ran on 2020-Apr-17 by ssquare'.

5. Select Add or Update Rule. Now that you have the rules you would like for the Wait List, you can repeat the steps to add more rules to make your report as precise as you want. For example, you may want to see a list of patients by city.
6. Click Run Report.

For further information on the Query Builder and creating your own reports, please access the Accuro User Guide in Accuro under the Start Menu. Click Help to bring up the Accuro User Guide and search Query Builder.

## DATA ANALYTICS

Accuro offers an enhanced Data Analytics and Dashboard platform that allows Providers to easily organize their patient and office data into insightful and visually appealing reports as well as work with healthcare organizations to support patient programs directly from the software. Data from the Wait List can be used to populate this Dashboard. If you or your office are interested in learning more about Data Analytics, please contact us at 1 (866) 454-4681.