Create a Wait List

Last Modified on 12/31/2019 9:52 am EST

Version 14.19

Overview

Your practice may wish to create a wait list. The wait list can be used to locate patients needing an earlier appointment or patients waiting to join the practice. Below are options for each scenario you may consider. Be sure to always follow your practice policy.
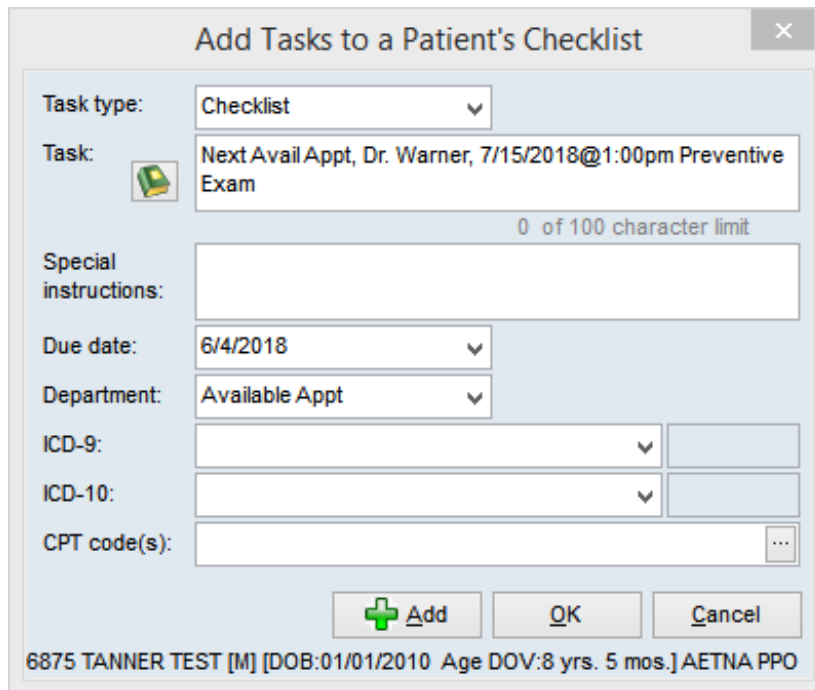
Create a Wait List Using a Task For a Patient Wanting an Earlier Appointment

Typically creating a wait list with a task is used in a practice when a parent requests the patient be seen if an earlier appointment becomes available. Modifying the practice workflow may be necessary.

1. Create a department for assignment of the task.

    a. Navigate to **Utilities > Manage Practice > Departments**
    b. Click the **Insert Record** button and add a Department Name and color, if desired.
    c. Click the **Post Edit** ✅ button to save your work.

2. Create a task.

    a. Open the Schedule and Practice Workflow window by selecting the **Sched** button.
    b. Locate and click the patient appointment. The patient's appointment will be selected.
    c. Click the **Tasks** button on the Smart Toolbar. The task window appears with the patient name at the top of the window.
    d. Click the **Add a New Checklist Task** ➕ button to open the Add Tasks to a Patient's Checklist window.
    e. Click the Task Type dropdown and select **Checklist**.
    f. Add pertinent information in the Task field such as, provider for scheduled appointment,

date and time and appointment reason.

g. The Due date field will default to the current date. Click the dropdown arrow to select a different date on the calendar.

h. Click the dropdown arrow and select the Department in the Department field. This will be the department created in the above step.

h. Click **OK** to save the task.

i. Close the Task window.

📌 **Note**: There is a 100 character limit on the Task field. The practice should decide what is relevant information that will be used when reviewing the task and scheduling.

3. Sort the task list. This may be done daily or weekly.

a. Click the **Tasks** tab in the Schedule and Practice Workflow window.

b. Click the **All** radio button in the Dates field group to view all open tasks.

c. Click the Filter icon in the**Department** column header. Select the department designated for the wait list.

d. Follow your practice policy on rescheduling appointments on the wait list.

4. Complete the task by double-clicking it or by clicking the dropdown and selecting **Complete** in the status field.

Create and Print a Wait List For Patients Wanting to Join the Practice

A wait list using the patient status of Wait List can be used for appointments, but is typically used by a practice not accepting new patients and wishing to create a waiting list. The patient status of Wait List is available in OP for use in the below steps. Be sure to always follow your practice policy when creating a new patient.

1. Create a new patient, for complete information on how to create a new patient click **here**.
2. Change the Status in the Patient Register window's Patient tab to **Waiting List** and click the **Post Edit** ✅ button to save the record. The As Of date will default to the current date (the date you are registering the patient).
3. Run the Demographic Analysis/Recall to locate all patients with a status of Waiting List.

    a. Click **Reports > Demographic Analysis/Recall** from the main menu.
    b. Set the Visit Dates report selection to **No date restriction**.
    c. **Deselect** the Active patient only checkbox.
    d. Click the **Search** button.
    e. Add the **Reg Date** column to the report. Click **here** to learn about adding columns to reports.
    f. Click the filter on **Pat Status** column and select **WAITLIST**. This list will display all of your patients who have a status of Wait List.

Version 14.10

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i. Close the Task window.

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