

Waiting List Prioritisation D Codes - Suggested Workflow

Training Department

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Introduction

Purpose

The purpose of this document is to provide suggested workflow in conjunction with the framework and operational guidance for the clinical prioritisation of waiting lists for endoscopy and diagnostic procedures published in May 2021 by NHS England and NHS Improvement coronavirus.

Audience

This document is intended to be used by any customers looking to facilitate workflow with the new waiting list prioritisation codes defined in Appendix A of the [Clinical prioritisation of waiting lists for endoscopy and diagnostic procedures: Framework and operational guidance](#) as follows:

Appendix A: Waiting list prioritisation codes

Table 1: Clinical validation of diagnostics waiting lists prioritisation codes, including feedback from clinical engagement

Waiting list prioritisation	
D1	Potentially life threatening or time critical conditions eg cardiac failure, significant bleeding, chest pain, renal failure, vision loss. Patients who are an emergency would fit into this category
D2	Potential to cause severe disability or severe reduction of quality of life eg, intractable pain. Urgent patients, including 2ww, would fit within this category
D3	Chronic complaints that impact on quality of life and may result in mild or moderate disability Routine patients who would normally be seen within the next 4-6 weeks
D4	Chronic complaints that impact on quality of life and may result in mild or moderate disability Routine patients who would normally be seen within the next 6-12 weeks
D5	Patient wishes to postpone procedure because of COVID-19 concerns
D6	Patient wishes to postpone procedure due to non-COVID-19 concerns

Waiting List Prioritisation Codes Workflow

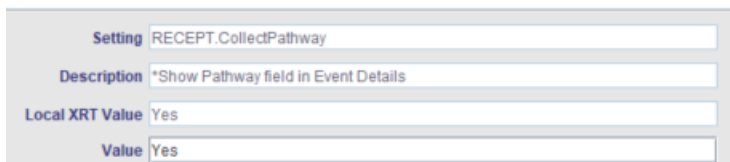
Following customer requests and consultation between stakeholders from Service, Training, Applications and Product Teams, Wellbeing Software would recommend the use of the **PATHWAY field**. This approach has been selected having ruled out other suggested workflows including Resource Groups, changes to Urgency codes and the use of Event Comments as it is judged to be the most effective method to allow customers to leverage an additional method of labelling existing requests as D1 - D4 in line with the framework and operational guidance for the clinical prioritisation of waiting lists for endoscopy and diagnostic procedures.

D5 and D6 requests can also be labelled in this way for consistency but are subject to additional recommendations on processing these types of events.

It should also be noted that Wellbeing Software expect to introduce a new **Vetting Priority** field to enable CRIS to hold both the **Referring / Requesting Urgency** and the **Vetting Priority** (i.e. Waiting or Scheduling Priority) in future releases. This will likely also have configuration to enable customers to map these fields to each other in a similar way to the current Reporting Urgency via CRISURG in Normal Tables, or to be left completely blank and require the field to be completed by Clinicians during the vetting process. There are however a number of related items linked to this development to scope, develop and test ahead of release and customers will require an upgrade to enable this future functionality.

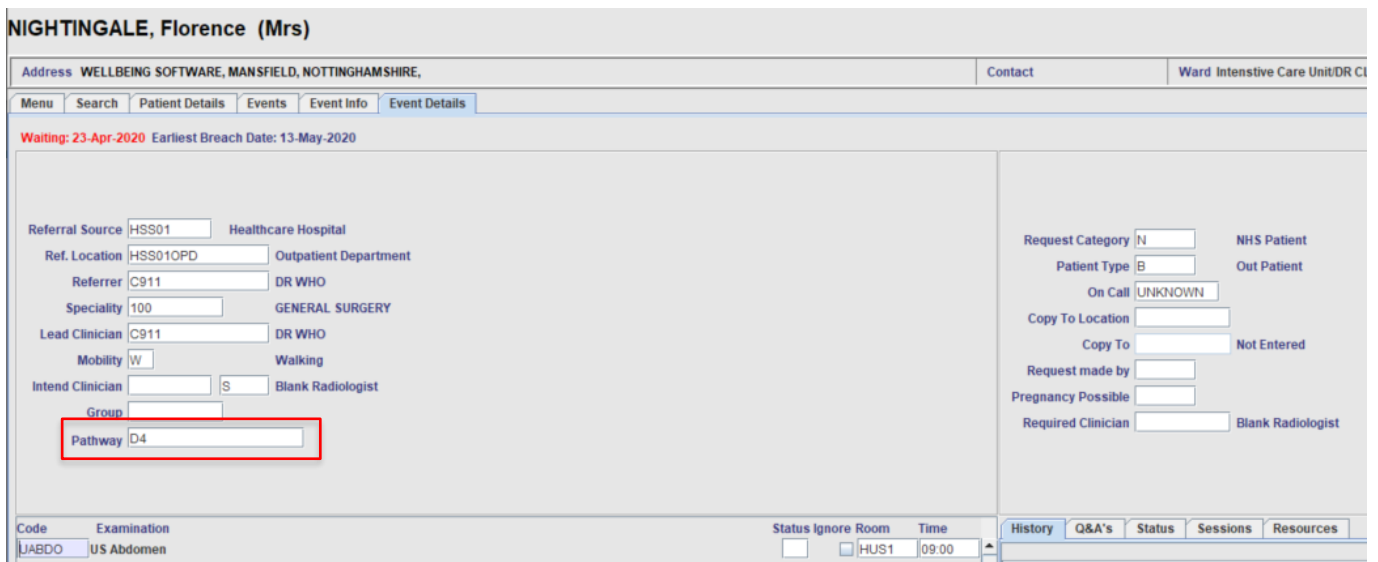
Deploying the PATHWAY field

The **Pathway field** can be utilised in all CRIS current versions and is enabled via the XR Setting RECEIPT.CollectPathway = Yes which controls it's display in the Event Details screen.



Setting	RECEIPT.CollectPathway
Description	*Show Pathway field in Event Details
Local XRT Value	Yes
Value	Yes

This is a free text field, and we would therefore recommend the input of **D1, D2, D3, D4, D5, D6** text as applicable in line with the guidelines via the Event Details screen, though the content of the field is obviously at the customers own discretion in conjunction with local working practice.



NIGHTINGALE, Florence (Mrs)

Address: WELLBEING SOFTWARE, MANSFIELD, NOTTINGHAMSHIRE, Contact: Ward: Intensive Care Unit/DR Cl

Menu Search Patient Details Events Event Info **Event Details**

Waiting: 23-Apr-2020 Earliest Breach Date: 13-May-2020

Referral Source	HSS01	Healthcare Hospital	Request Category	N	NHS Patient
Ref. Location	HSS01OPD	Outpatient Department	Patient Type	B	Out Patient
Referrer	C911	DR WHO	On Call	UNKNOWN	
Speciality	100	GENERAL SURGERY	Copy To Location		
Lead Clinician	C911	DR WHO	Copy To		Not Entered
Mobility	W	Walking	Request made by		
Intend Clinician		S Blank Radiologist	Pregnancy Possible		
Group			Required Clinician		Blank Radiologist
Pathway	D4				

Code Examination Status Ignore Room Time

UABDO US Abdomen [] HUS1 09:00

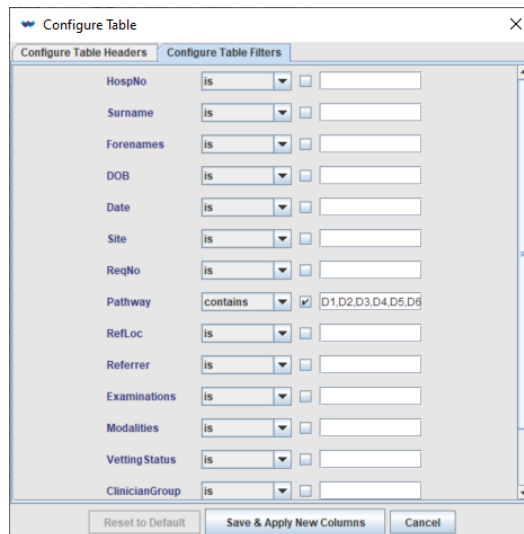
History Q&A's Status Sessions Resources

Customers should also log a **Service Request** to implement the Pathway field as a column which can be added to Worklists such as the [Vetting List], [Waiting List] and [Report Info List] etc. to enable:

- Visibility
- Reordering by the Pathway column in Ascending or Descending order

Vetting List															
Filter Profile: Waiting List Priority Codes New Edit Save Delete Events: 2/747 Exams: 2/793															
gNo	Surname	Forenames	DOB	Date	Site	ReqNo	Pathway	RefLoc	Referrer	Examinations	Modalities	VettingStatus	ClinicianGroup	Practitioner	Status
SS	NIGHTINGALE	FLORENCE	01-Jan-1990	23-Apr-2020	HSS01	COVID19 - D4		HSS01OPD	C911	UABDO	U	VN		HSS01	COVID19 - Rebook Req
	POTTER	HARRY	21-Jun-1984	12-Jul-2021	HSS01	D5 - COVID - D5		HSS01OPD	C911	MPNER	M	VC		HSS01	D5 - COVID Postpone...

- Advanced Filtering using **Configure Table Columns** and contains D1,D2,D3,D4,D5,D6 or other variables as required.



Configure Table

Configure Table Headers | Configure Table Filters

HospNo	is	
Surname	is	
Forenames	is	
DOB	is	
Date	is	
Site	is	
ReqNo	is	
Pathway	contains	<input checked="" type="checkbox"/> D1,D2,D3,D4,D5,D6
RefLoc	is	
Referrer	is	
Examinations	is	
Modalities	is	
VettingStatus	is	
ClinicianGroup	is	

Vetting Workflow

Wellbeing Software would also recommend the use of **Reception Mode** instead of **Vetting Mode**, to make access to the 'Pathway Field' via the Event Details screen more seamless until the new **Vetting Priority** field is developed. This is a workaround which will take the Clinician from the Vetting screen back to the Event details in order to add the Pathway ID. Without this workaround, the Clinician would have to Vet the request then reload the patient and open the Event Details to add the Pathway ID. This is negated by the use of Reception Mode.

Once implemented Clinicians can vet existing and new requests, evaluate the requesting urgency, and confirm or amend this if applicable, before adding a [Protocol] or selecting [Standard or No Protocol] or equivalent.

They will then be returned to the **Event Details** screen when using Reception mode where they can apply the **Waiting List D Priority Code** via the **Pathway Field** before clicking [Save] or another relevant status – i.e. [Waiting].

Alternatively, if no D code is required the Clinician can just press [F5] to clear the Event details and return to the [Vetting List] or other worklist.

D5 and D6 Postponed Requests

Wellbeing Software would suggest that all orders, requests, waiting list events and appointments which comes under D5 and D6 categories are cancelled using an appropriate cancellation status in line with DM01 guidelines / local working practice - i.e. Patient Change (to reset the waiting time clock) or Discretionary Change (does not reset the waiting time clock). These can then either remain in that state as a final cancellation and returned to the referring clinician or placed on a suitable Postponed Waiting List for review subject to agreed local workflow.

In all cases the action of cancel should be undertaken prior to placing on a waiting list or rebooking, to record the cancellation for audit purposes and action clock resets as applicable.

To undertake this process, we would suggest customers consider implementing new cancellation and Waiting list statuses as follows:

Creating Waiting Priority Status Codes

To create the new statuses recommended in this workflow go to Tables > Other Tables > Status Codes and click [New] to add the following suggested options, prior to clicking [Save]

Creating Cancelled Statuses

The following cancellation codes are suggested by Wellbeing Software. However, each Trust can feel free to create their own codes and descriptions based on local practices and terminology.

Code	Category	Type	Description	Long Description
CPCR	C	CP	COVID19 Risk	Patient cancelled due to Coronavirus risk
CPD5	C	CP	D5 - COVID Postponement	Patient postponed procedure due to COVI...
CPD6	C	CP	D6 - Non COVID Postpone...	Patient postponed procedure - NOT due t...

Code: CPD5

Category: C Cancelled

Type: CP The patient cancelled the appointment

Description: D5 - COVID Postponement

Long Description: Patient postponed procedure due to COVID-19 concerns

Order: 23

End Date:

☐ Default

Code: CPD6

Category: C Cancelled

Type: CP The patient cancelled the appointment

Description: D6 - Non COVID Postponement

Long Description: Patient postponed procedure - NOT due to COVID-19

Order: 25

End Date:

☐ Default

Creating Waiting Postponed Statuses

Wellbeing Software would recommend the customer also considers creating discreet Waiting Lists for D5 and D6 patient postponements. However, each Trust can feel free to create their own codes and descriptions based on local practices and terminology or make these waiting lists *planned* rather than *Patient Postponed* if required.

Code: WND5

Category: W Waiting

Type: WP The patient has postponed the appointment

Description: D5 - COVID Postponement

Long Description: Patient postponed procedure due to COVID-19 concerns

Order: 11

End Date:

☐ Default

Code: WND6

Category: W Waiting

Type: WP The patient has postponed the appointment

Description: D6 - Non COVID Postponement

Long Description: Patient postponed procedure - NOT due to COVID-19

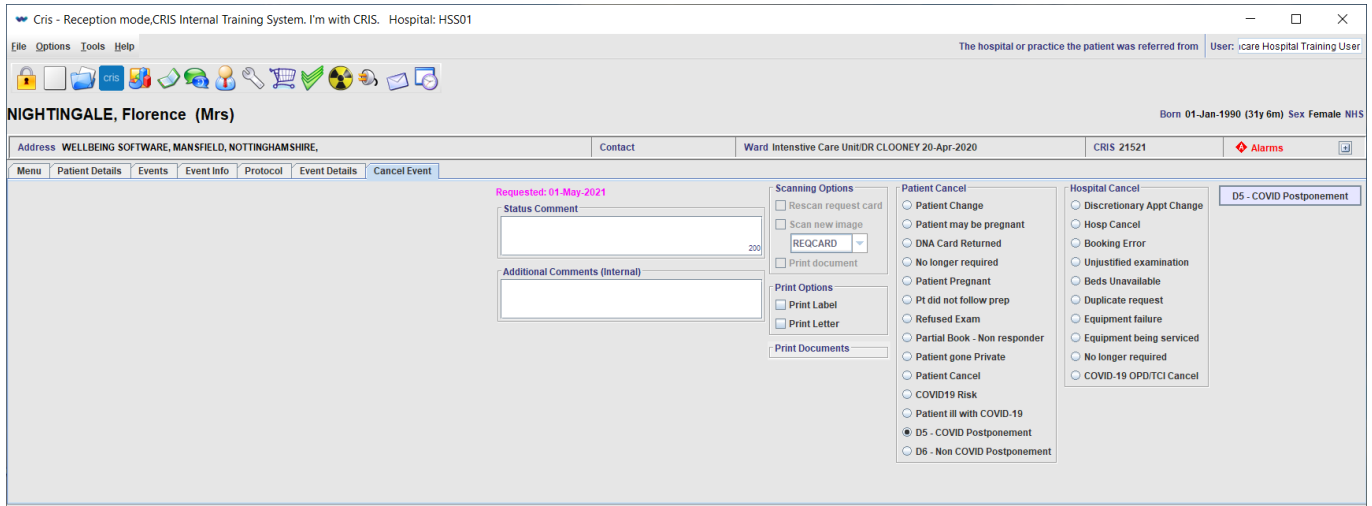
Order: 12

End Date:

☐ Default

Using Waiting Priority Status Codes

The following routine Outpatient request has been cancelled using the new **D5 – COVID Postponement status** which can be configured as either Patient Cancel (if the clock should be reset) or Hospital Cancel (if the clock should not be reset) based on DM01 guidelines / local working practice:



CRIS - Reception mode, CRIS Internal Training System. I'm with CRIS. Hospital: HSS01

The hospital or practice the patient was referred from: User: jcare Hospital Training User

NIGHTINGALE, Florence (Mrs) Born 01-Jan-1990 (31y 6m) Sex Female NHS

Address: WELLBEING SOFTWARE, MANSFIELD, NOTTINGHAMSHIRE, Contact: Ward: Intensive Care Unit/DOR CLOONEY 20-Apr-2020 CRIS 21521 Alarms

Menu Patient Details Events Event Info Protocol Event Details Cancel Event

Requested: 01-May-2021

Status Comment

Additional Comments (Internal)

Scanning Options

- ☐ Rescan request card
- ☐ Scan new image
- REQCARD
- ☐ Print document

Print Options

- ☐ Print Label
- ☐ Print Letter
- Print Documents

Patient Cancel

- ☐ Patient Change
- ☐ Patient may be pregnant
- ☐ DNA Card Returned
- ☐ No longer required
- ☐ Patient Pregnant
- ☐ Pt did not follow prep
- ☐ Refused Exam
- ☐ Partial Book - Non responder
- ☐ Patient gone Private
- ☐ Patient Cancel
- ☐ COVID19 Risk
- ☐ Patient ill with COVID-19
- ☒ D5 - COVID Postponement
- ☐ D6 - Non COVID Postponement

Hospital Cancel

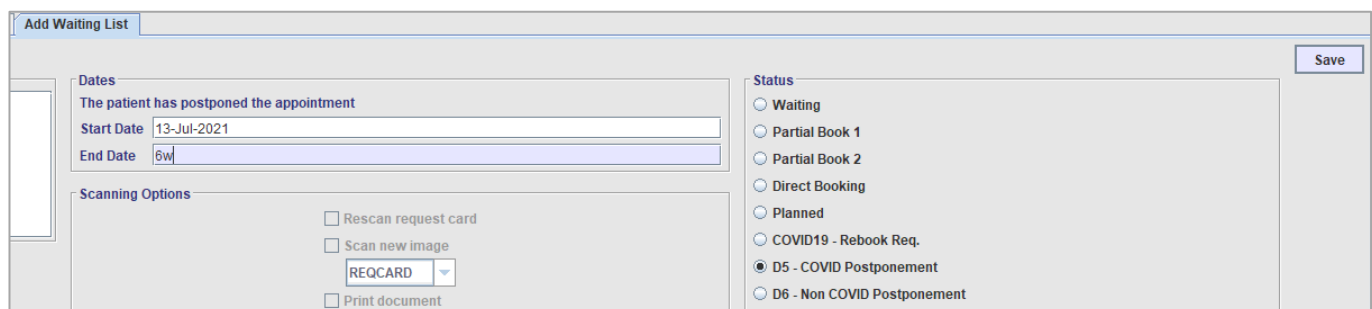
- ☐ Discretionary Appt Change
- ☐ Hosp Cancel
- ☐ Booking Error
- ☐ Unjustified examination
- ☐ Beds Unavailable
- ☐ Duplicate request
- ☐ Equipment failure
- ☐ Equipment being serviced
- ☐ No longer required
- ☐ COVID-19 OPD/ICU Cancel

D5 - COVID Postponement

The status history will clearly reflect the type of cancellation ahead of being placed back on a CRIS Waiting List which should be regularly reviewed in line with the new guidelines at 6-week intervals.

History	Q&A's	Status	Sessions	Resources
Date	Time	Category	Type	Examination
13-Jul-2021	11:58	Cancelled	D5 - COVID Postpo...	CSKUH
13-Jul-2021	11:54	Vetted	Completed	CSKUH
13-Jul-2021	11:54	Vetted	Justified	CSKUH
01-May-2021		Request	Received	CSKUH

Having record the type of cancellation in the status history, then event is then placed onto the new D5 – COVID Postponement Waiting List which includes an End Date to enter the 6w review date.



Add Waiting List

Dates

The patient has postponed the appointment

Start Date: 13-Jul-2021

End Date: 6w

Scanning Options

- ☐ Rescan request card
- ☐ Scan new image
- REQCARD
- ☐ Print document

Status

- ☐ Waiting
- ☐ Partial Book 1
- ☐ Partial Book 2
- ☐ Direct Booking
- ☐ Planned
- ☐ COVID19 - Rebook Req.
- ☒ D5 - COVID Postponement
- ☐ D6 - Non COVID Postponement

Save

Managing D Code Waiting Priority lists

In all cases, the new Waiting List Priority codes via the **Pathway field** can be managed in the following ways:

- **Using CRIS Worklists** (i.e. Vetting List, Waiting List or Report Info List] with the addition of the Pathway Column and associated sorting or Filter Profiles
- **Using the Sessions Module** populated via Stats using either of the Pathway fields - i.e. EVENTS.HasPathway or EVENTS.PathwayID

Statistics

Stat Name: Waiting List Priority D Codes

Main | **Selections** | Outputs | Scheduler | Previous Stats

Stat Start Date: [] Stat End Date: [] Selection Name: []

Available Fields: Filter: PATHWAY

- EVENTS
 - ☐ Has Pathway
 - ☐ Pathway ID
- ORDERS

Selected Fields: EVENTS.Pathway ID

in: D OR in: d

Output 1

Output Name: []

Pick Output Format Types

☐ Comma Delimited Format ☒ User Friendly Format

☐ Show Selections ☒ Fit To Page ☒ Small Text ☐ Show Selections

Output Fields: Total Lines: [] Group Data By: [] Output Order: []

Available Fields: Filter: []

- ACTIONCD
- ACTIONCOMMENTS
- ACTIONS
- ALARM
- ALARMCD
- AVDATA

Selected Fields: EVENTS.Event key Length = 9
EVENTS.Pathway ID Length = 20
PATIENT.Full Name Length = 30
EVENTS.Has Pathway Length = 11

Cris Stats Viewer

Date Run : 12-Jul-2021 Waiting List Priority D Codes Page 1

Time Run : 16:13 Run By : HSS01

Event key	Pathway ID	Name	Has Pathway
32032	D4	FLORENCE NIGHTINGALE	Y
32558	D5	HARRY POTTER	Y
33356	D1	ALFIE SOLOMONS	Y

End Of Stat Report

- **Using CRIS Statistical Reports** and either of the Pathway fields EVENTS.HasPathway or EVENTS.PathwayID to export data to a 3rd party solution – i.e. EXCEL.

Related Links / Documentation

Links to NHS England and NHS Improvement Coronavirus

<https://www.england.nhs.uk/coronavirus/publication/clinical-prioritisation-of-waiting-lists-for-endoscopy-and-diagnostic-procedures/>

Documentation

[Clinical prioritisation of waiting lists for endoscopy and diagnostic procedures: Letter](#)

[Clinical prioritisation of waiting lists for endoscopy and diagnostic procedures: Framework and operational guidance](#)

Document Control

Title	COVID-19 - Waiting List Prioritisation D Codes - Suggested Workflow		
Owner	Wellbeing Training Manager	Date Created	13/07/2021
File Ref.	CRIS_COVID-19_Waiting_Priority_D_Codes_Suggested_Workflow_WS_V1.0		
CRIS Version			
Change History			
Issue	Date	Author / Editor	Details of Change
D1.0	13/07/2021	Emma Savage-Mady	Draft Issue
V1.0	16/07/2021	Emma Savage-Mady	First Issue
Review Date		16/07/2022	