SWIM – Access to Care

Remove from the Waitlist



Quick Reference Guide

Remove a patient from the waitlist who does not need or no longer agrees to surgery

Remove from the Waitlist	
1. Find the patient	Perform a search and find the patient that should be removed from the Wait List
2. Open Case Details Actions	 Select the patient name to open the Case Details screen. From the Case Details Action dropdown list select Remove from Waitlist. Case Details Actions V Change History QuickQuote Remove from Waitlist Create Duplicate Entry Create Repeat/Follow-up Entry Apply Lockbox to This Case Email Patient
 Remove patient from the waitlist 	 Enter the date the decision was made remove the patient from the waitlist Select the most appropriate removal reason from the dropdown list Add any relevant notes, Consider recording the date and time you were notified to remove the wait list entry, who asked for the action (i.e., the patient, the family, the surgeon, etc.), and expand on what reasons were given Click Remove Patient
	If the patient had a surgery date, the date will be cancelled. There will be an option to hold an empty appointment for the patient's time slot
	If a patient was added more than once on the wait list in error, follow the same steps as above. Select 'Duplicate Wait List Entry'