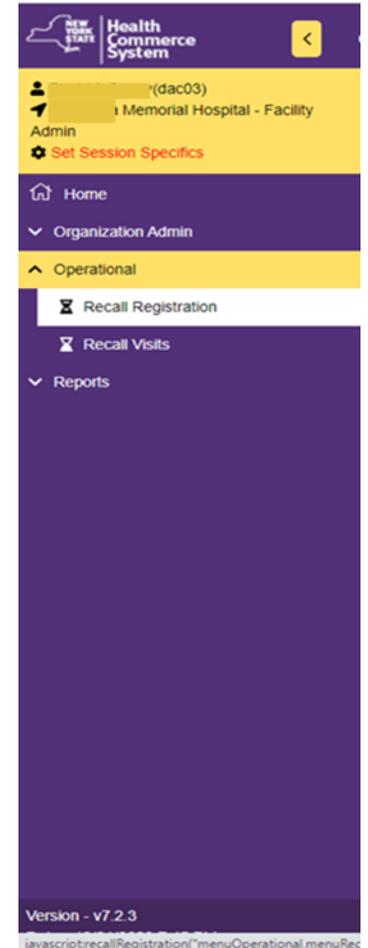


Process to Cancel Appointments and Eliminate a Time Slot

The first thing that is needed to cancel appointments is to find the names associated with the appointments which need canceling and finding their contact information. Times when cancelling patients is appropriate: there has been an overbooking of time slots, you do not have anticipated vaccine or other clinic emergencies such as, weather, power etc. To do this, first, recall the registrations for your operations.

Instructions for Recalling Registrants:

1. From the Home screen, select the '**Operational**' menu option and click on '**Recall Registration.**'
2. In the 'Set Session Specifics' screen, select the **Event**, the **Form Name** and the name of the **POD** from the provided drop-down menus.
3. Click on 



Instructions for Recalling Registrants:

4. On the '**Recall Registration Search Results**' screen, use the up and down arrows



to help sort your results to find the date and times you need to cancel. If

easiest, you can download this information into excel by using the green button



5. In the information with appointment information is the patient's phone and email address. It is your organization's choice as to whether you call all individuals or do a blast BCC to all email addresses needing cancelling.

*Note, if using the email option for privacy, sending all as a BCC is crucial. BCC (or Blind Carbon Copy) for most email is in the message under your cc options. If it is not, check your options within your email message to turn on your BCC.

6. Whichever contact method your organization chooses, you will need to direct your patient that their appointment needs to be cancelled and rescheduled for another date.

If the patient was registered by a superior, they should relay that message onto them for assistance in rescheduling. They will need to go into their confirmation email for their appointment and click the link to cancel. As you receive confirmation that this is occurring, you will now need to move to step two which is changing capacity.

Instructions for Changing Capacity:

7. You will want to frequently check your schedule for patients who have cancelled as directed but not notified you, or as someone notifies you that they have cancelled as instructed to set your capacity to 0 so no one else may register again in that time slot.
8. To get into your operation schedule go to Organization Admin > Operations and click the blue hyperlink next to your clinic. Then click the link titled 'Registration Schedule'
9. Scroll until you see all your operation dates and click the  button associated with the date you would like to change.

10. This will load your schedule (which from afar looks like this):

Schedule Time Slots

Start Time (HR:MIN)	End Time (HR:MIN)	Capacity	Registered	Cancelled	Remaining	Attended	+ Add Time Slot
Walk-ins		Unlimited	0		Unlimited	0	
01:00 PM	01:15 PM	5	5	1	0	5	Delete
01:15 PM	01:30 PM	3	3	0	0	3	Delete
01:30 PM	01:45 PM	5	2	0	3	2	Delete
01:45 PM	02:00 PM	5	0	1	5	0	Delete
02:00 PM	02:15 PM	5	1	0	4	1	Delete
02:15 PM	02:30 PM	5	2	0	3	2	Delete
02:30 PM	02:45 PM	5	5	0	0	3	Delete
Totals		33	18	2	15	16	

Update 12/26/2020 Deadline and/or Capacities

- 11. We will be looking mainly at the columns of 'Capacity', 'Registered' and Cancelled'
- 12. For a time slot that looks like this (below) -which you would like eliminated – change the capacity to zero so no one else can register in the cancelled spot.

Schedule Time Slots

Start Time (HR:MIN)	End Time (HR:MIN)	Capacity	Registered	Cancelled	Remaining	Attended	
<input type="text" value="v"/> <input type="text" value="v"/> <input type="radio"/> AM <input type="radio"/> PM	<input type="text" value="v"/> <input type="text" value="v"/> <input type="radio"/> AM <input type="radio"/> PM	<input type="text"/>					<input type="button" value="+ Add Time Slot"/>
Walk-ins		Unlimited	0		Unlimited	0	
01:00 PM	01:15 PM	<input type="text" value="5"/>	5	1	0	5	<input type="button" value="Delete"/>
01:15 PM	01:30 PM	<input type="text" value="3"/>	3	0	0	3	<input type="button" value="Delete"/>
01:30 PM	01:45 PM	<input type="text" value="5"/>	2	0	3	2	<input type="button" value="Delete"/>
01:45 PM	02:00 PM	<input type="text" value="5"/>	0	1	5	0	<input type="button" value="Delete"/>
02:00 PM	02:15 PM	<input type="text" value="5"/>	1	0	4	1	<input type="button" value="Delete"/>
02:15 PM	02:30 PM	<input type="text" value="5"/>	2	0	3	2	<input type="button" value="Delete"/>
02:30 PM	02:45 PM	<input type="text" value="5"/>	5	0	0	3	<input type="button" value="Delete"/>
Totals		33	18	2	15	16	

Remember after your changes to click ‘Update deadline / capacities’

*Note, if you receive an error when you click ‘update’, look at all your registered columns – for any registered slot that is overbooked, you will need to make that capacity to match the overbook. Meaning – if your registered column says 3, but your capacity says 2, you need to change the capacity to 3 for all other changes to save.