CANCELLING AN APPPOINTMENT AND ADDING IT TO THE WAITLIST

If an appointment needs to be rescheduled and a future date is not available, follow the steps below and choose a reason prefixed with RESCHEDULE as the cancel reason. This is the prompt to create a pending appointment.

1. From the ORM Scheduler Desktop select the appointment that is to be rescheduled by highlighting it.

2. Click Change Status footer button and the *Change Appointment Status* window will open

3. *Appt Status,* press F9 for the Lookup list and select **CANCELLED**

4. *Cancel Reason*, pick one that is prefixed with **Reschedule**
   - Reschedule or Edit reason will save it to the waitlist. Type "RE" (Reschedule) or "ED" (Edit) and press F9 for the Lookup list of Reschedule/Edit reasons
   - Do not pick a reason prefixed with CANCEL since that means you are cancelling the case completely and it will not go to the waitlist
   - Enter a comment (optional)
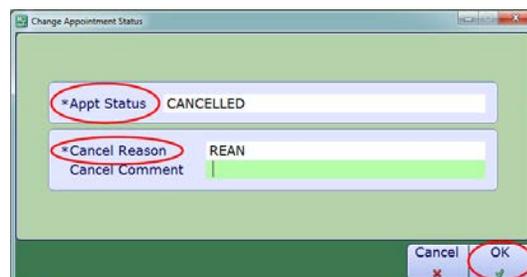
5. **F12** or OK to save/ file.

6. A pop up screen will appear:

Default Waitlist Date is the old appointment's waitlist date or today	
*Create Pending Appointments	Y
*Waitlist Date	DEFAULT
Short Notice	

   - **Create Pending Appointments** field, enter **Y** (Yes) to put this patient's appointment on the Waitlist.

   - *Waitlist Date* will auto populate with **DEFAULT.** This date can be changed by entering in a new waitlist date in the DD/MM/YY format.

     The **DEFAULT** waitlist date is today, unless the appointment was previouisly on the Meditiech waitlist. If the appointment was previously waitlisted, that will be the default date

   - *Short Notice* is used if the patient can be contacted and booked quickly without much notice, usually within a day or less (site defined). This is used when sorting the Waitlist.

7. **F12** or OK to save/ file.

8. Patient will be removed from the grid and placed on the Waitlist.

9. **If the patient has a PRE, REG or ADM account the user must switch it to a new account prior to putting the case on the waitlist or after putting them on the waitlist.**
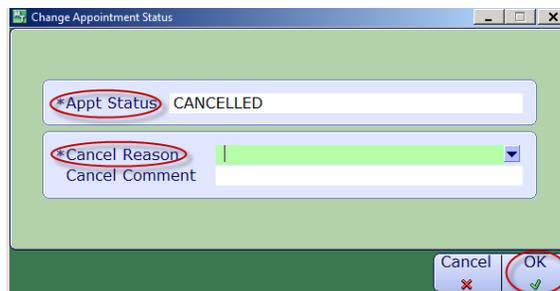
CANCELLING AN APPPOINTMENT COMPLETELY (NOT ADDED TO WAITLIST)

When cancelling an appointment make absolute certain that the **correct patient is selected**. Once a patient is cancelled completely (not saved to waitlist) there is **no way to undo it.**

1. From the `ORM Scheduler Desktop` select appointment on the *scheduled grid* or the *patient appointment list*
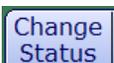
2. Click `Change Status` the footer button

3. *Change Appointment* window appears.

   - *Appt Status* field click **F9** for the Lookup list and pick *Cancelled*.
   - *Cancel Reason* field, click F9 and pick a reason
     IMPORTANT: To save case on waitlist pick a reason prefixed with **RESCHEDULE (RE)or Edit (ED)**.
     To remove an appointment completely from the system, pick a reason prefixed with **CANCEL (CA)**
   - A comment may be added in the *Comments* field

4. F12 or [OK] to Save.

5. If the case you are cancelling is after the patient has been admitted to the hospital, you may need to cancel the OR chart also. There is a different cancellation process that supports cancelling the chart and the case completely (it will not allow you to waitlist). Click the link below for details.

   [Cancelling a Surgical Profile (chart)](#)

ACCIDENTAL APPOINTMENT CANCELLATION

Unfortunately there is no way to undo a cancellation of an appointment unless you saved it to the waitlist but if you need to confirm the patient name and original surgery date/time, you can print a list.

1. Click **Cancellations** then **List**
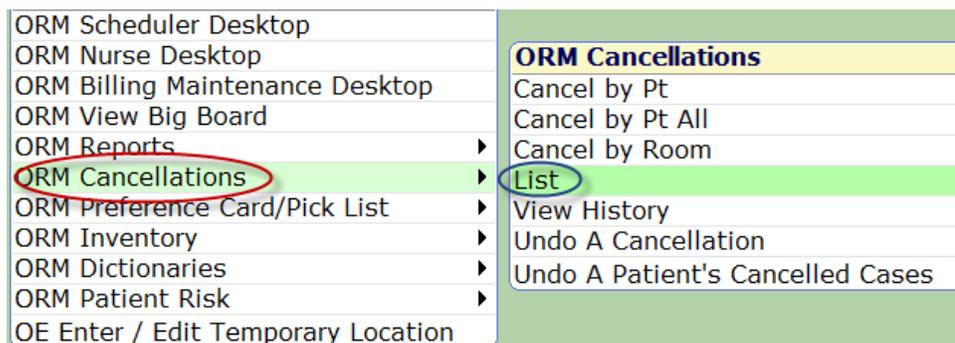
2. Enter *From Date* and *Thru Date* in the fields. *This refers to the date of actually cancelling the case and not the scheduled date of surgery.*

| *From Date | 21/11/16 |
| *Thru Date | 21/11/16 |

3. Click **F9** in the *Room Group* field to open the Lookup to pick the room group.

| *Room Group | DRDORALL |

4. Tab/Enter through *From Specialty* and *Thru Specialty* and BEGINNING and END will populate the fields.

| *From Specialty | BEGINNING |
| *Thru Specialty | END |

5. Tab/Enter through the *Cancel Reasons* field and ALL will auto populate.

Cancel Reasons
ALL

6. Click **F12** Or [OK] to complete the request.
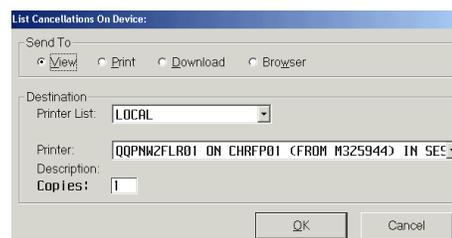
List Cancellations On Device:
Send To
• View   ○ Print   ○ Download   ○ Browser
Destination
Printer List: LOCAL
Printer: QQPNW2FLR01 ON CHRFP01 (FROM M325944) IN SES
Description:
Copies: 1

[OK]   [Cancel]

7. View or print the list of cases

8. Make note of the patient and information to rebook the patient.

CANCELLING EMERGENCY CASES AND/OR SURGICAL PROFILE (CHART)
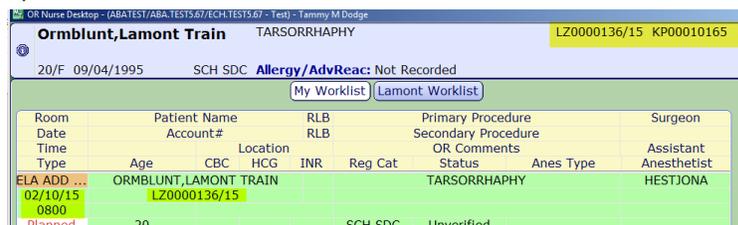
All emergency cases scheduling directly from the Nurse Desktop, can only be cancelled using the steps below. All instances where a chart needs to be cancelled can only be cancelled using the steps below.

You may need to cancel a blank or documented surgical chart for various reasons such as duplicate chart, emergency case that is cancelled, elective case cancelled but chart did not cancel with the case, or charted on wrong patient. Once it is cancelled you cannot undo this and all documentation would be lost so you must be sure you are **cancelling the correct chart**. There is an undo cancellation feature but it does not work for old cases, documented cases, or admitted/registered patients, so always assume that your cancellation cannot be undone.
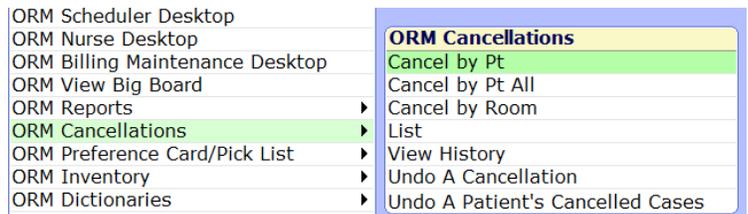
Please complete the following steps to delete (cancel it)

1. This process is for cancelling a surgical chart once it is not visible on the scheduling grid or an emergency case booked via the Nurse Desktop. If you want to cancel a scheduled appointment only, with/without waitlisting option, please see or

2. Recommend you review the Surgical Chart via the ORM Nurse Desktop to:

   - Validate the account number connected to the profile
   - Confirm the date/time (e.g. may be duplicates with same account numbers)
   - See if there is documentation filed on this case
   - Ensure appropriate account/case to cancel.

OR Nurse Desktop - (ABATEST/ABA.TEST5.67/ECH.TEST5.67 - Test) - Tammy M Dodge
Ormblunt,Lamont Train TARSORRHAPHY   LZ0000136/15 KP00010165
20/F 09/04/1995   SCH SDC **Allergy/AdvReac:** Not Recorded
[My Worklist] [Lamont Worklist]

Room	Patient Name	RLB	Primary Procedure	Surgeon
Date	Account#	RLB	Secondary Procedure	
Time	Location		OR Comments	Assistant
Type	Age	CBC	HCG	INR	Reg Cat	Status	Anes Type	Anesthetist
ELA ADD ...	ORMBLUNT,LAMONT TRAIN			TARSORRHAPHY	HESTJONA
02/10/15	LZ0000136/15				
0800					
Planned	20			SCH SDC	Unverified	

3. Proceed to **ORM Cancellations** on menu (clerical and managers access only)

4. Enter into the **Cancel by Patient** routine

ORM Scheduler Desktop	ORM Cancellations
ORM Nurse Desktop	Cancel by Pt
ORM Billing Maintenance Desktop	Cancel by Pt All
ORM View Big Board	Cancel by Room
ORM Reports ▶	List
ORM Cancellations ▶	View History
ORM Preference Card/Pick List ▶	Undo A Cancellation
ORM Inventory ▶	Undo A Patient's Cancelled Cases
ORM Dictionaries ▶	

5. Enter account information or patient identification

- Mulitple cases for the same patient may appear in the case lookup, so ensure you pick the correct one because you cannot undo this once you file it.

```
Patient      |                                              ▼

Account Num  
Physician    
Specialty    
O.R.         

Date of Birth
Age          
Sex          
Patient Status
Room-Bed/T.loc
Actual Op Date
Actual Op Time

          Proposed Procedures    P/S   Severity   R/L/B   Duration
 1
 2
 3

Total

*Cancel Reason  
```

- Choose the appropriate **Cancel Reason** (required field) and regardless of the reason you pick, this will never put the case back on the waitlist.

- You may also be asked to cancel the OR appointment, if it is still active and/or to cancel the account. You can say yes to all these options, as they will only present themselves when there are no other active links or appointments with this account in any module.

6. Click **F12** or [OK] to Save

7. Ensure within the EMR the surgical Profile no longer appears active in the **Other Reports**