



## Task Analysis for Cancelling Appointments (Updated October 4, 2021)

### Center Staff:

1. Email [centeradmin@coloradobehavior.com](mailto:centeradmin@coloradobehavior.com) notifying us of any cancellations, including reason for cancellation.
  - a. Enter all affected appointments in CentralReach that need to be cancelled.
  - b. Example: If you are scheduled with AaBb (client initials) 9am-12pm and AaCc (client initials) 12pm-4pm on the day you are cancelling, this needs to be entered in Rethink

### In-Home Staff:

1. Email [Scheduling@coloradobehavior.com](mailto:Scheduling@coloradobehavior.com) + the supervisor on the case(s) you are cancelling session(s) for notifying us of last-minute cancellation, including reason for cancellation.

## All Staff:

1. **\*NEW\*** Cancel affected appointments. **Note:** Staff have permission to cancel single appointments only. Staff do not have permission to cancel repeat appointments.

a. To cancel appointment (see screenshots at the end of this file):

i. Click on the affected appointment

ii. Select cancel

**Scheduling** Full Details

APPOINTMENT: DATE & TIME: 10/04/2021 - 9:00 AM to 5:00 PM

**Olivia Romero**  
Labels: Fully Vaccinated, OTR, Scheduler

**Client Admin**  
Labels: None

APPOINTMENT DETAILS CREATE TIMESHEET

Location: [Add location](#)

Participants: None

Created/Last Change: By: Olivia Romero  
On: Sep 29 11:24 am

Single Event Labels:  Click here to add labels

Recurring Event Labels:  Click here to add labels

iii. Select reason for cancellation

**Olivia Romero**  
Labels: Fully Vaccinated, OTR, Scheduler

**Client Admin**  
Labels: None

APPOINTMENT DETAILS CREATE TIMESHEET

Location: [Add location](#)

Participants: None

Created/Last Change: By: Olivia Romero  
On: Sep 29 11:24 am

Single Event Labels:  Click here to add labels

Recurring Event Labels:  Click here to add labels

Reason for cancelling?

Please provide an optional reason

This appointment is part of a series. Cancel just this one occurrence, or this and all remaining occurrences?

**Olivia Romero**  
Labels: Fully Vaccinated, OTR, Scheduler

**Client Admin**  
Labels: None

APPOINTMENT DETAILS CREATE TIMESHEET

Location: [Add location](#)

Participants: None

Created/Last Change: By: Olivia Romero  
On: Sep 29 11:24 am

Single Event Labels:  Click here to add labels

Recurring Event Labels:  Click here to add labels

Reason for cancelling?

Please provide an optional reason

This appointment is part of a series. Cancel just this one occurrence, or this and all remaining occurrences?

Reason for cancelling?

- Provider Change
- <24 hours
- <24 hours
- >24 hours
- >24 hours
- Approved Time Off
- Company Cancellation

**iv. Include notes in the section below reason for cancellation**

The screenshot shows an appointment details form for Olivia Romero (Fully Vaccinated, OTR, Scheduler) and Client Admin. The form includes fields for Location, Participants, Created/Last Change, Single Event Labels, and Recurring Event Labels. A dropdown menu for 'Provider Change' is set to 'Following sick policy', which is circled in red. Below this, a warning message states 'This appointment is part of a series. Cancel just this one occurrence, or this and all remaining occurrences?' with two buttons: 'Cancel this one' and 'All remaining'.

**v. Select Cancel this one.**

This screenshot is identical to the one above, but the 'Cancel this one' button is circled in red, indicating the correct action to take.

2. Submit a **Cancellations/Daily Changes form** (in-home or center) found on the website under **STAFF RESOURCES**:
  - a. **\*NEW\*** Select “yes” or “no” for question: Is the appointment already cancelled? (Submitting form for documentation purposes)
    - i. This allows us to monitor that appointments are being cancelled correctly and prioritize making changes to appointments or cancelling appointments that were already converted
  - b. If out multiple days, only one form is needed.