This guide will help you reschedule, cancel and rebook appointments.

I. No Show Appointment

A no show is an appointment that was not kept without explanation – no request was made to cancel or reschedule the appointment.

A. Do not delete or change the appointment in any way. Every night at midnight the system will automatically switch the appointment to No Show status.

B. Rebooking a No Show appointment
If the appointment was scheduled in the past (even 30 minutes later) and the patient wants to come in (even the same day), do not check-in the appointment or reschedule it for a new date and time. We want to make sure the appointment stays as a No Show for tracking.

1. Right-click on the appointment and select *Copy*.
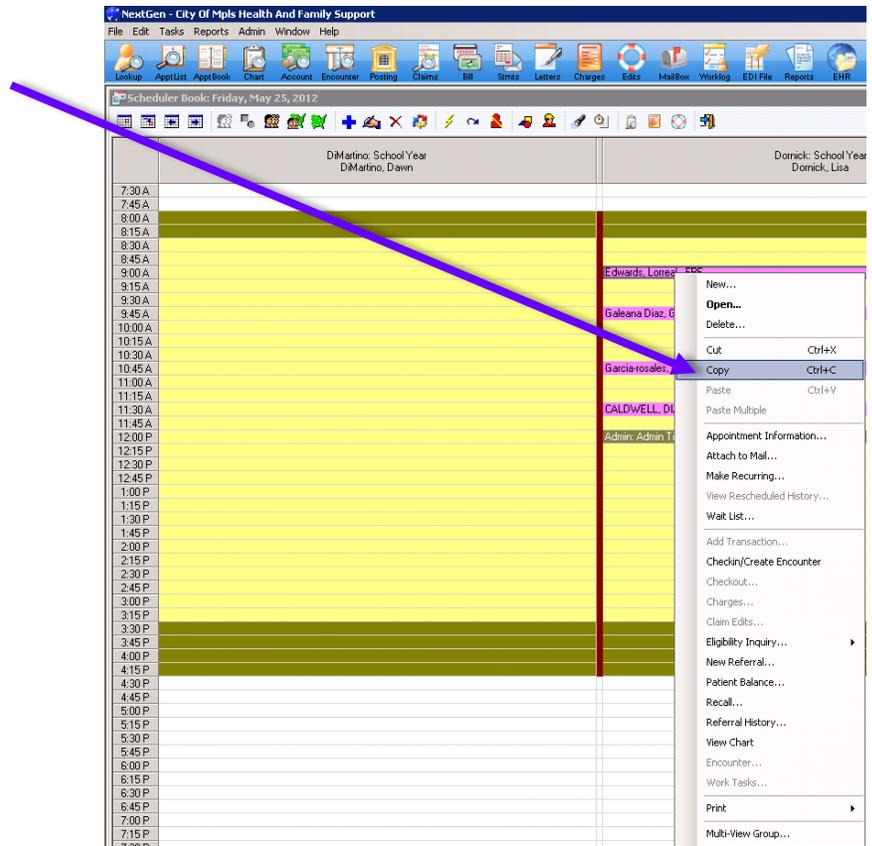
2. Go to the new time slot, right-click and select *Paste*

3. Verify the appointment information is correct in the Schedule Book and click *OK*

Note: You can also book a brand new appointment, whichever is easiest for you.
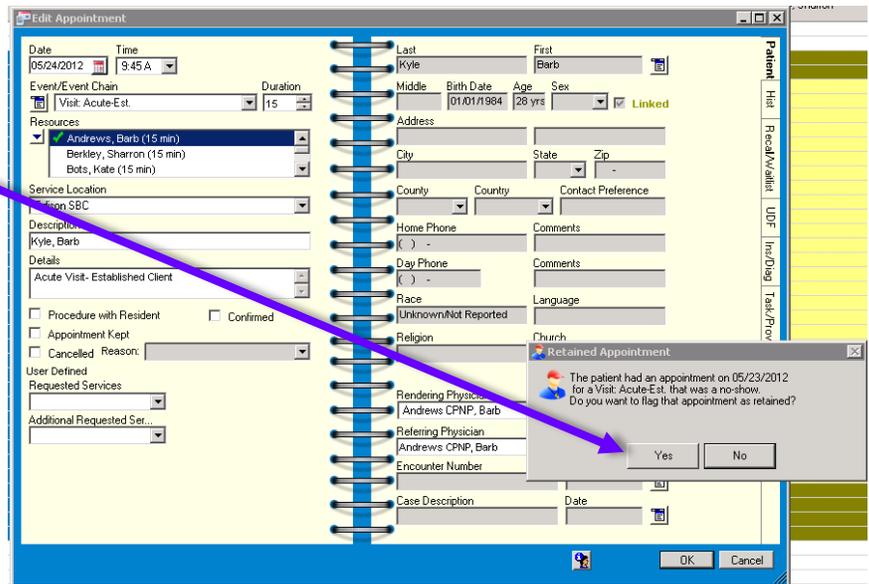
4. An alert will appear asking if you want to flag the old no show appointment as retained. Click *Yes*.

5. Leave the original appointment as is for tracking purposes.

II. Rescheduling an Appointment

Rescheduling an appointment is when you need to change an appointment that **occurs in the future** (not a no show or checked-in appointment).

A. Right-click on the appointment and select *Cut*.

B. Go to the new time slot, right-click and select *Paste.*

C. Verify the appointment information is correct in the Schedule Book and click *OK.*

Note: You can also open the appointment and change the date and/or time, whichever is easiest for you.
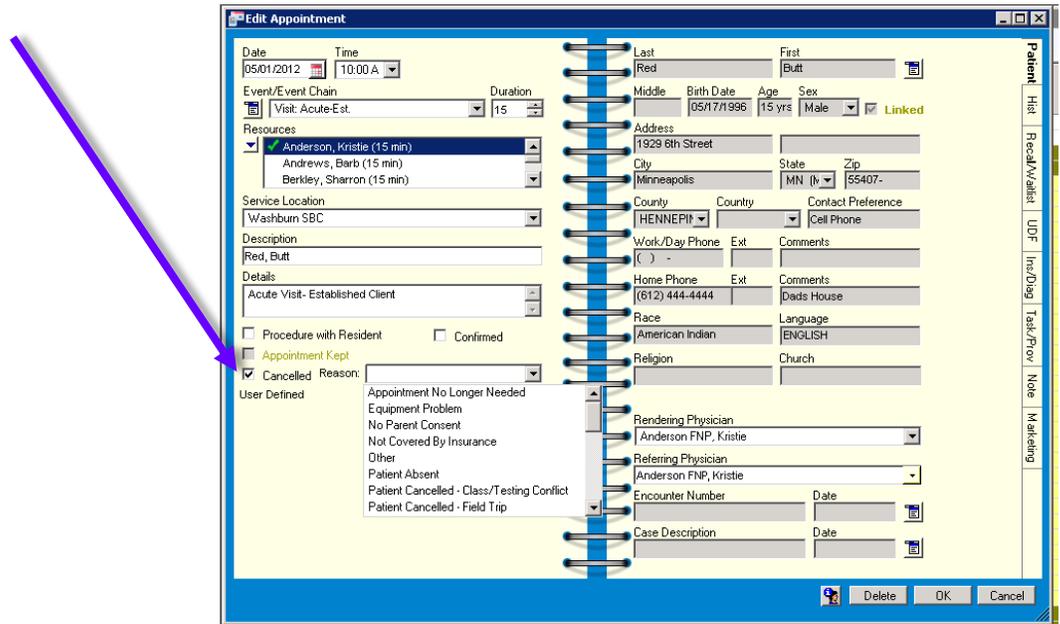
D. Select the proper rescheduling reason.
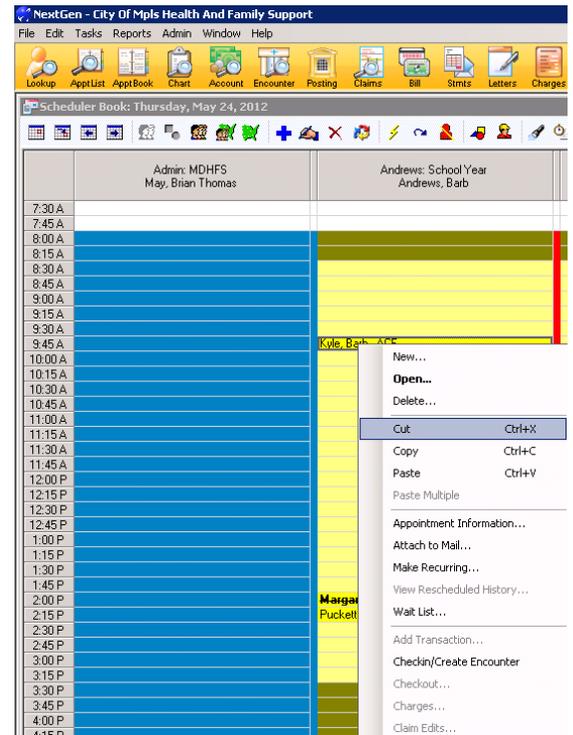
III. Cancelling an Appointment

Only appointments that occur in the future should be cancelled (not a no show appointment). If the appointment has already checked-in and needs to be cancelled or rescheduled, see Section IV.

A. Open the appointment in the Appointment Book.

B. Check the *Cancelled* box and select the proper reason.

C. Click *OK*.

IV. Cancelling/Rescheduling a Checked-in Appointment

If an appointment has been checked-in, it already has an encounter and insurance linked to it and will need to be undone.
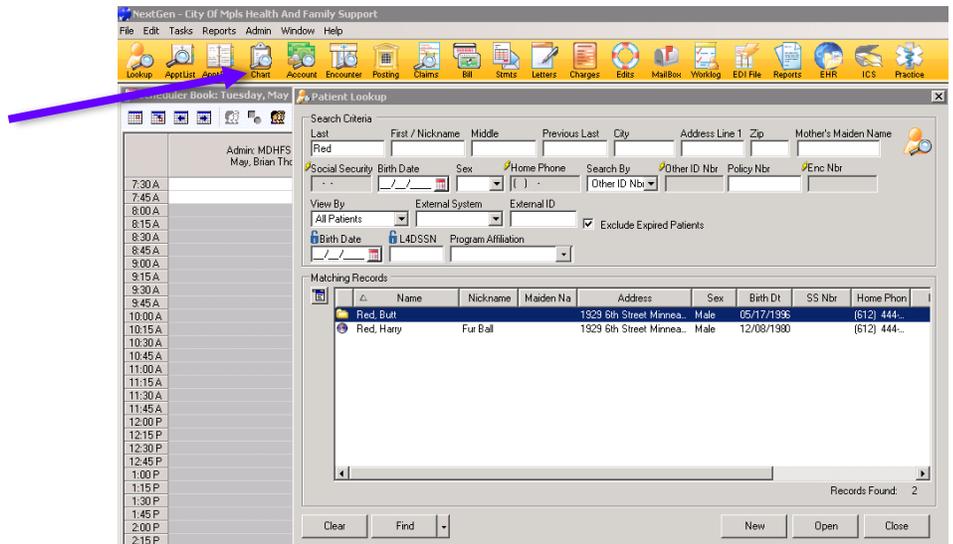
A. **Unlinking the Encounter to the Appointment**

1. Open the checked-in appointment in the Appointment Book

2. Click on the *Norton* button next to *Encounter Number* and choose *Clear Encounter*.

3. Follow the instructions above to either reschedule or cancel the appointment.
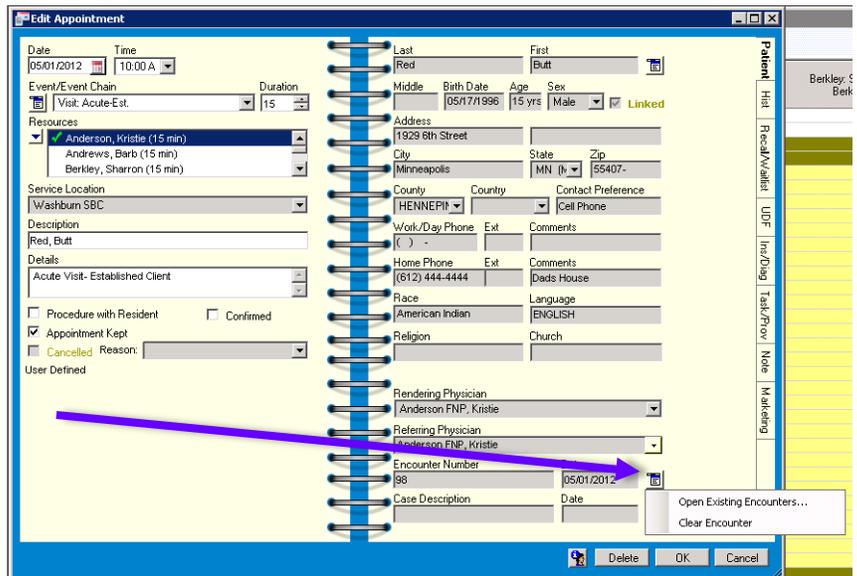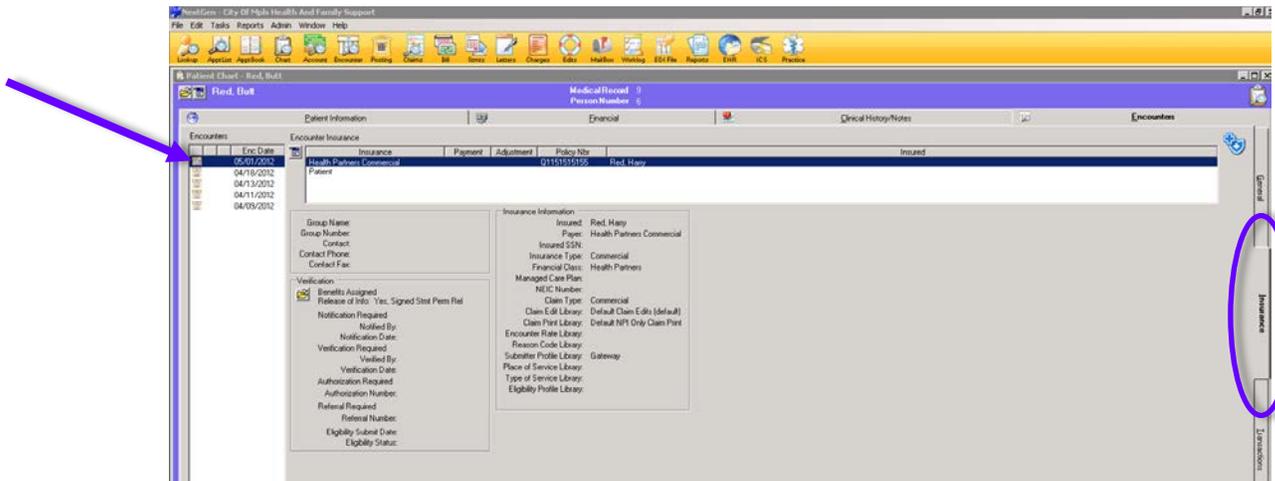
B. Deleting the Encounter

1. Click on *Chart* and search for the patient's chart

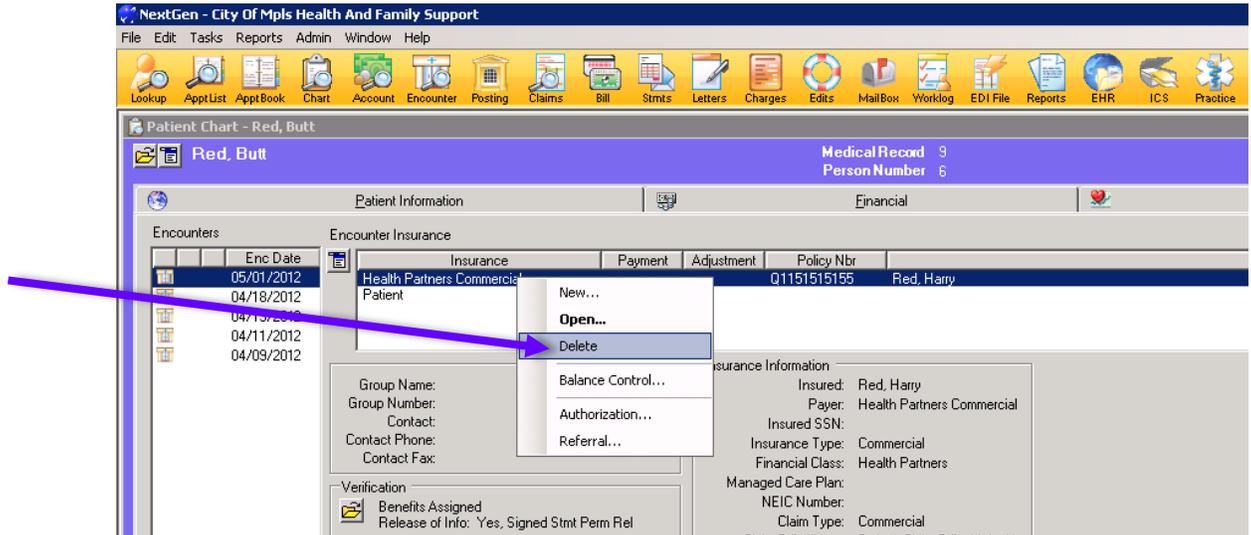2. In the patient's chart, click on the *Encounter* tab.

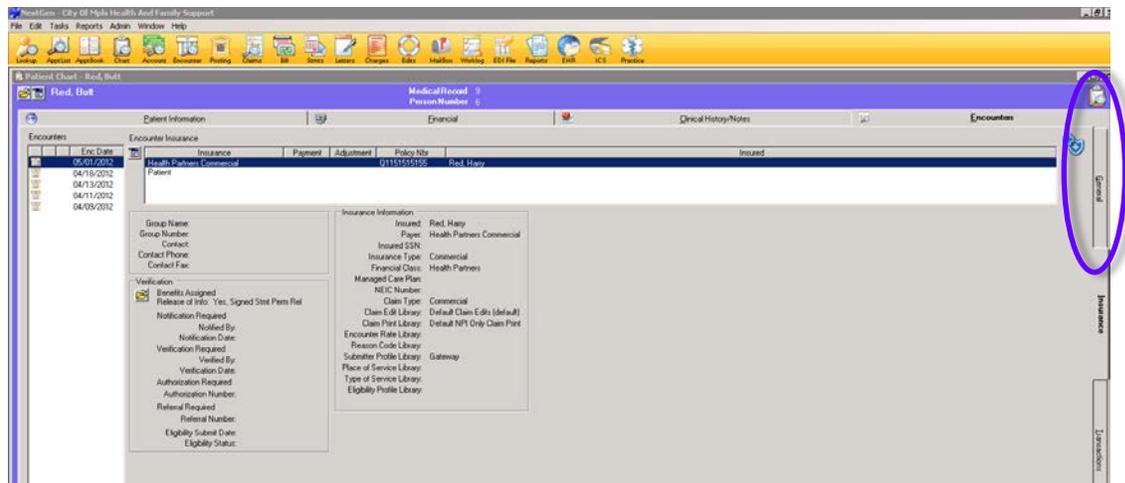3. Select the encounter of the appointment you just cancelled or rescheduled

4. Click on the *Insurance* tab

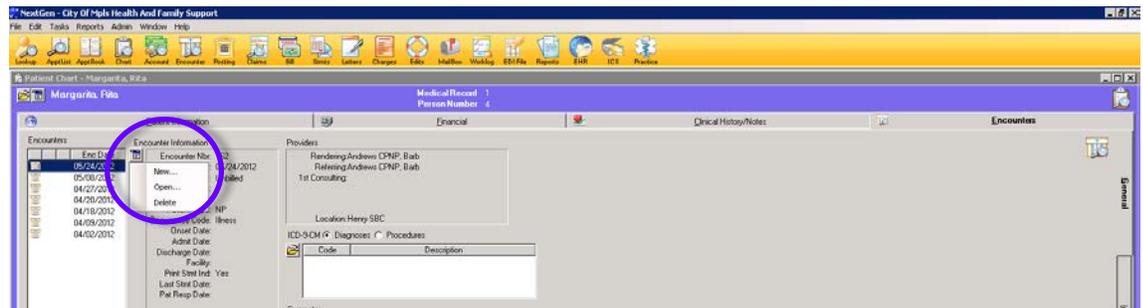5. Right-click on the Insurance payer listed and select *Delete*.

6. Click on the General tab

7. Click on the *Norton* button and select *Delete*

Note: Only the MA/OSS group, Brian and Barb can complete Step 7. Email or Task them in NextGen to complete this for you.

Congrats! You are done with this How-to Guide.