



## Administration – Cancellation and Rescheduling

### Aim

Clients for various reasons Cancel and/or Reschedule their booked appointments. The aim is to capture existing clients who cancel and do not reschedule.

### Process – Existing Client

#### Administration

1. Locate client appointment in the TM2 diary
2. For cancellations - At the end of the day (say 5:00pm) enter a 'New Other' in description enter CANCELLED then the persons name diabetes type and appointment type (ie. i/R/PGR)
3. Right click on the original appointment and select 'Cancel Appointment'
4. In the client database enter that the appointment has been cancelled, plus the following if appropriate:
  - Reason – if given
  - Other comments if required (eg. did not wish to reschedule)
5. If rescheduling, enter a 'New Other' at the end of the day stating Rescheduled, clients name and the date rescheduled to.
6. Right click on the original appointment and select 'Move Appointment' then click on the date the appointment is rescheduling to and then click on the time to drop the appointment into that slot. Edit the appointment and make a note that it has been rescheduled.

#### Health Professional

1. As the CANCELLED appointments appear in diary printouts, the HP will review Client Database to assess the period for recall and change the review date in the database or contact the client accordingly

### Process – New Client

#### Administration

1. Same as for an existing client except that there will not be a client database entry
2. If a new client is cancelling, do not enter their address, so that their diary entry shows they have not been here. Do not delete them from TM2 due to reporting purposes.
3. If a referral has been received, write DNA next to the sticker. The cancellation will be captured when sending DNA Letters to GPs

**NOTE:** GDM clients who cancel appointments should be transferred to a DNE, or if unavailable email DNEs to follow-up

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Healthy Living NT  
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