STATUS UPDATE – APPOINTMENT STATUS

Best Practice for making Status Updates from the Scheduling Calendar:

For Individual appointments: change the Appointment Status to Cancelled

For Group appointments: choose the client(s), and leave the Appointment Status as Scheduled

<u>Steps</u>

1. In the Scheduling Calendar, right-click the appointment and select Status Update.

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- 2. For group appointments, the Group Member Selection screen displays. Check off the group members to include and click OK.
- 3. The Status Update form displays.
 - a. For <u>individual</u> appointments, change the Appointment Status to <u>Cancelled</u> so that the appointment is removed from the calendar (the missed visit will be reported in the Missed Visit Appointment Report).
 - b. For group appointments, leave the Appointment Status as <u>Scheduled</u> so that further updates can be made to the group calendar entry.
- 4. In the Missed Visit check box, click Yes to indicate that the client missed the appointment.
- 5. In the Missed Visit Service Code field, select the appropriate code from the drop down list.
- 6. Click Submit.

Note: For group appointments, the Status Update form will display subsequently for the chosen members.

7. If presented with a message to post the missed visit appointment, always choose No:

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This appoint appointment	ment is being filed as tupon filing?	a missed visit. Do you wish to post f	his				
	Yes	No					