

# Scheduling and Referrals – Cancelling a Check Out



## This Quick Reference Guide will explain how to:

Cancel a Check Out, this should only be used for the below reasons:

- Renewed Referral
- Incorrect Referral attached
- Incorrect Patient/Appointment has been Checked Out

## Cancelling a Check Out

1. Select 'Eye' Icon in Scheduling Appointment Book



2. Select Person Tab -> Patient Schedule (All History) Inquiry

- Bring your patient up

Person Resource Location Request List

Inquiry:  
Patient Schedule (All History)

Person:  
TESTWHS, WILLIAM\_MEDORDER MR

Start date: 28/05/2024 Start time: 0000

End date: 28/05/2024 End time: 2355

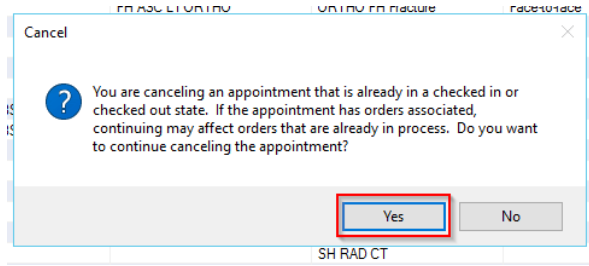
3. Find your appointment that has been checked out. Highlight the appointment, right click and select Cancel.

Scheduled Dt/Tm	Appt Type	Appt Location	Resource	Mode of Contact	Scheduling Comments	Event/Schedule	Appt Status
28/05/2024 - 3:00 PM	Gynaecology MBS New	SJK WC 1A GYN	Myers, Clare OP	Face-to-face		12009194-1	Checked Out
23/05/2024 - 9:00 AM	Paediatric Medicine MRS Review	SJK WC GFA MFD	McCann, Brendan OP	Face-to-face		12009008-1	Rescheduled

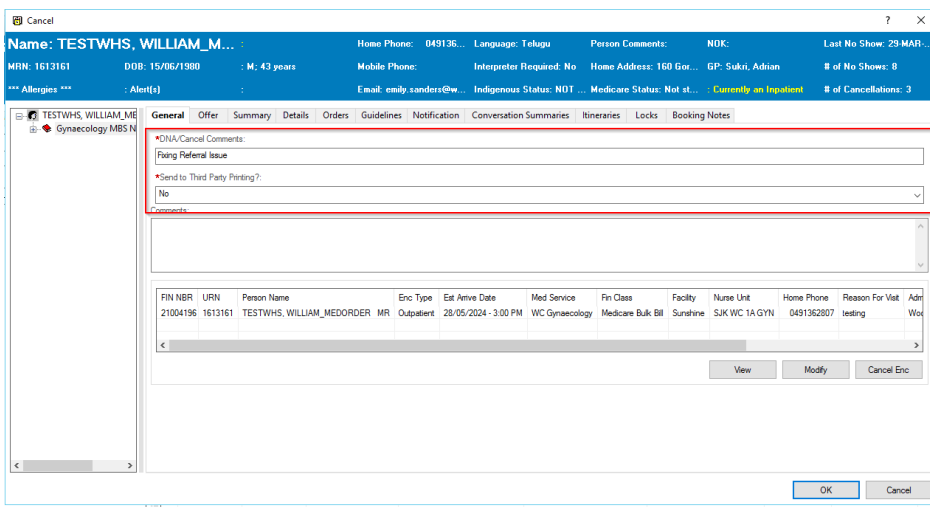
Appt Status	Action Reason	Appt
Checked Out	Confirm...	Appt
Rescheduled	Contact...	Required
Booked(Confirmed)	Modify...	
Attended(Checked)	Reschedule	
Attended(Checked)	Hold...	Required
Attended(Checked)	Cancel...	
Booked(Confirmed)	No Show...	
Booked(Confirmed)	Check In...	Required
Rescheduled		
Booked(Confirmed)		



4. Select Yes.

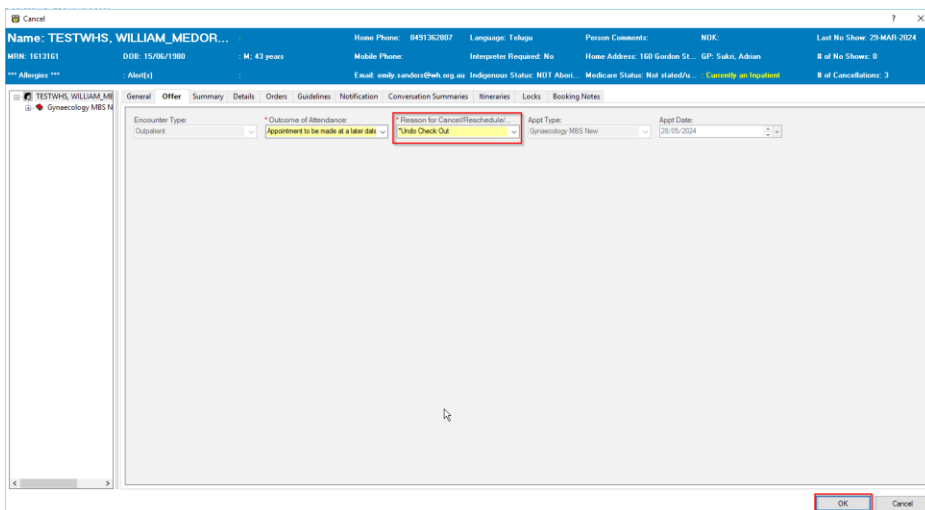


5. On the general Tab type out the reason you are cancelling the check out. Select No to printing a letter.



6. On the offer tab select the reason \*Undo Check Out

- Select Ok



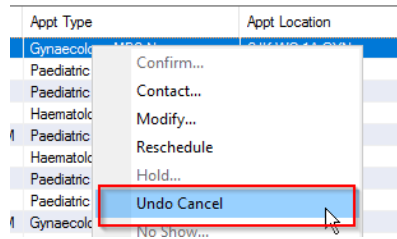
**Handy Hint**

If the appointment needed to be cancelled, no further action is required.

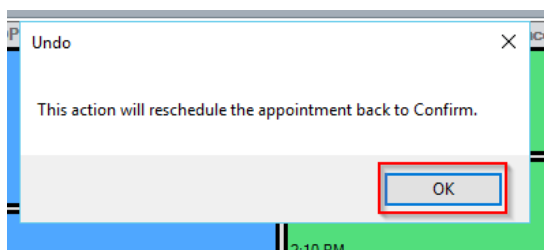


7. Appointment is now in a Cancelled Status. Highlight the appointment, right click and select Undo Cancel

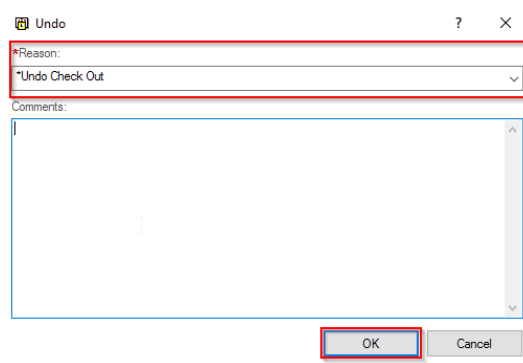
Scheduled Dt/Tm	Appt Type	Appt Location	Resource	Mode of Contact	Scheduling Comments	Event/Schedule	Appt Status
28/05/2024 - 3:00 PM	Gynaecology MBS New	SJK WC 1A GYN	Myers, Clare OP	Face-to-face		12009194-2	Cancelled
23/05/2024 - 9:00 AM	Paediatric Medicine MBS Review	SJK WC GFA MED	McCann, Brendan OP	Face-to-face		12009008-1	Rescheduled



8. Undo message will appear select OK



9. Select \*Undo Check Out and select OK



10. Appointment is now back into a Booked(Confirmed) status

Scheduled Dt/Tm	Appt Type	Appt Location	Resource	Mode of Contact	Scheduling Comments	Event/Schedule	Appt Status
28/05/2024 - 3:00 PM	Gynaecology MBS New	SJK WC 1A GYN	Myers, Clare OP	Face-to-face		12009194-2	Rescheduled
28/05/2024 - 3:00 PM	Gynaecology MBS New	SJK WC 1A GYN	Myers, Clare OP	Face-to-face		12009194-5	Booked(Confirmed)

### Handy Hint



If you will be checking in this patient and don't need to update the referral, you are not required to follow the below steps.

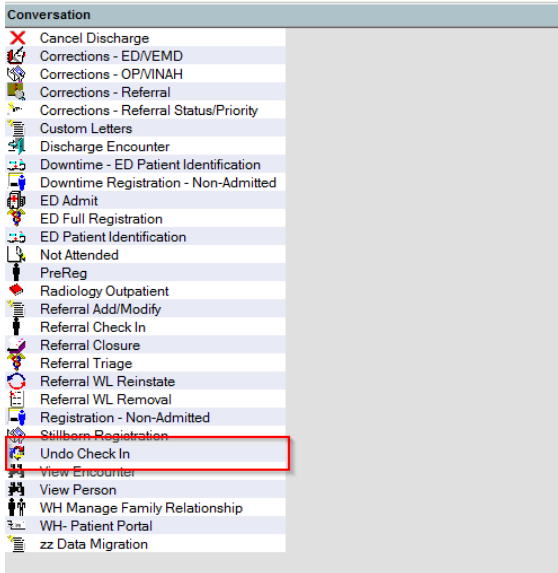


11. As the encounter was flipped to an Outpatient encounter you need to do the below steps to correct the referral

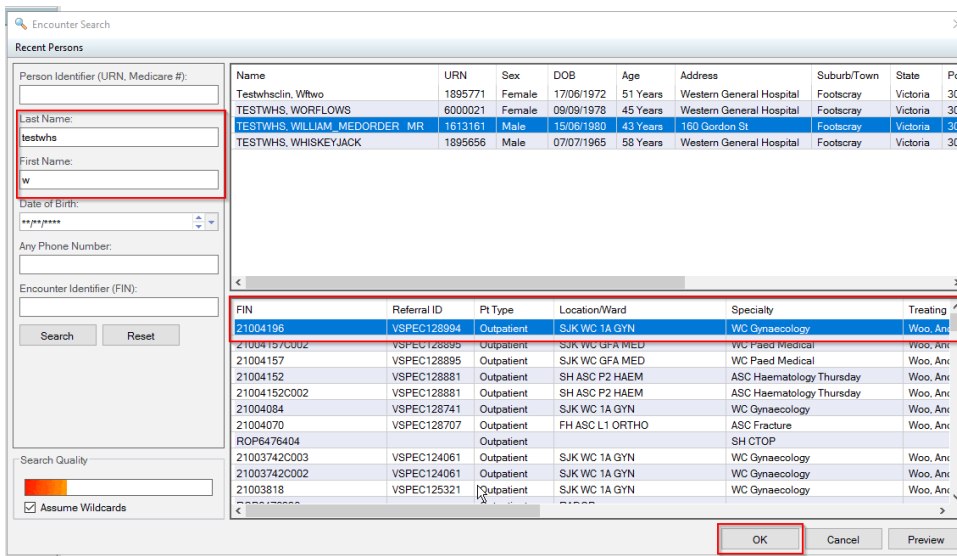
URN	Person Name	Enc Type
1613161	TESTWHS. WILLIAM_MEDORDER MR	Outpatient

Current State Information

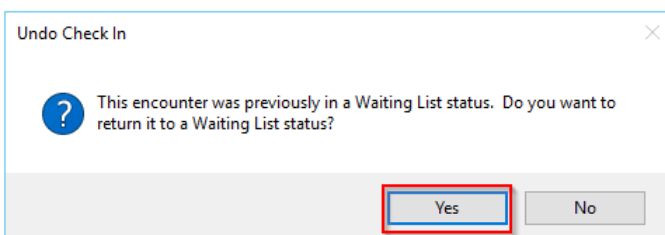
Log into PMOffice, under the Conversation section select Undo Check In



12. Search for your patient and select the appropriate encounter you would like to flip



13. Undo Check in pop up will appear, select Yes to flipping the encounter type back





14. Once the conversation has appear select OK

15. Encounter will now be flipped to its Original Encounter Type (Referral/PreReg)

URN	Person Name	Enc Type
1613161	TESTWHS, WILLIAM_MEDORDER MR	Referral

**Important**

Now that the encounter type has been flipped, you can fix your referrals as per current processes. Once you have fixed your referral please remember to complete the ckeck in and check out workflows. Link: [Scheduling-and-Referrals-Referral-Renewal.pdf \(wh.org.au\)](https://wh.org.au/Scheduling-and-Referrals-Referral-Renewal.pdf)

**Handy Hint**

Reschedule appointment and select 'No' to retaining associated referral. Select the correct Referral or continue with the renewed referral work flow.