

Canceling Schedules

1. Log in to EVV → Navigates you to the Home Screen
2. Click on scheduling



3. Search for the Client that you want to cancel the schedule. Select the blue arrow by client field:



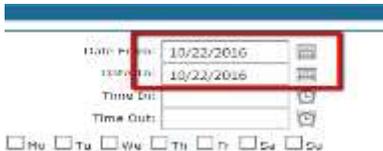
4. Enter first initial/name and last initial/name:

A screenshot of the search input fields. A red arrow points to the 'First Name' field. The fields are: First Name, Last Name, Chart ID, SSN, and ZIP.

5. Select Refresh



6. Double click on the name that returns in the search result that you want to cancel the schedules on and this action navigates you back to the Scheduling Overview Screen
Select the date range for the schedules that need to be cancelled



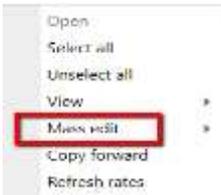
7. Select Refresh



- Select the schedules you want to cancel by either pressing and holding the shift key to multi select or right click and select all. The color once selected will be dark gray

| | | | | | | | | | |
|--------------|-----------|-------------------------------|---------------------|--------|-----|-------|-------|---|---|
| 10/04/16-Tue | ABC-Brown | ALBANESE, ARM: P-16614581-MD4 | ST JUSTE, SANEI CNA | SS125C | DEF | 08:30 | 10:30 | E | 2 |
| 10/05/16-Wed | ABC-Brown | ALBANESE, ARM: P-16614581-MD4 | ST JUSTE, SANEI CNA | SS125C | DEF | 08:30 | 10:30 | E | 2 |

- Right click and chose mass edit --> status



- Pop up comes up -- Select status of Cancelled and then Save

A screenshot of a 'Status' dialog box. It contains the text 'Please select status for Schedule.' and four radio button options: 01-Pending, 02-Confirmed, 09-Hold, and 10-Cancelled. The '10-Cancelled' option is selected and highlighted with a red box.

- Reason code window opens -> Select Reason -> Select Save

A screenshot of a reason code selection window. It features a table with columns 'Name' and 'Initiated By'. The first row is selected and highlighted in blue, with a red arrow pointing to it. Below the table is a 'Note:' field and a 'Task Note:' checkbox. At the bottom, there are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

| # | Name | Initiated By |
|-----|---------------------------------|--------------|
| 13 | Adj made, rebill to other Payor | Client |
| 01 | Client Cancel | Client |
| 08 | MD appt- not home | Client |
| 09 | No answer to locked door | Client |
| 07 | Pt in hospital | Client |
| REF | Pt/Cg refused | Client |
| 04 | Removed from home by family | Client |
| 12 | Duplicate Entry | Other |
| 06 | Frequency orders changed | Other |
| 15 | Pt changed insurance | Other |
| 14 | Pt DC | Other |
| 05 | Pt expired | Other |
| 03 | Scheduling Error | Other |
| SYS | System Cancel | Other |

- Returns you to the Scheduling Overview Screen and the Schedules no longer display

A screenshot of a scheduling overview screen. At the top, it displays summary statistics: Total Client Hours: 0.00, Total Client Visits: 0, Total Staff Hours: 0.00, and Total Staff Visits: 0. Below this is a navigation bar with a page size of 100. The main table has columns: Date, Coordinator, Client, Chart ID, Staff, Pos, and Service. The table content is empty, and the text 'No records to display.' is highlighted in a red box.

| Date | Coordinator | Client | Chart ID | Staff | Pos | Service |
|------------------------|-------------|--------|----------|-------|-----|---------|
| No records to display. | | | | | | |