



# Cascades Steps

## Cancelling Appointments



Follow these steps to cancel a participant's or a family's appointments. We show you two ways to cancel appointments:

- Use **Method 1** if you need to search for the appointment date to be cancelled.
- Scroll down to **Method 2** if you already know the date of the appointment to be cancelled.

Steps	Cascades Screen																																																																																																
<p><b><u>METHOD 1</u></b> If you need to find the date of the appointment to cancel:</p> <p><b>Search for the family record:</b></p> <ol style="list-style-type: none"> <li>1. Select <b>Family Services</b>, then <b>Family Search</b>.</li> <li>2. Add your <b>Search Criteria</b>:           <ul style="list-style-type: none"> <li>• Check-mark <b>Family</b> and <b>Participant</b> boxes.</li> <li>• Enter a few letters or all of last and/or first name.</li> <li>• Uncheck <b>Active Only</b> box.</li> <li>• Select <b>Search</b> button.</li> <li>• In <b>Search Results</b> box, select one of the participants you want.</li> </ul> </li> </ol> <p>Select <b>pencil icon</b> to open the participant's record.</p>	<div data-bbox="537 467 1102 727"> <p>Home <b>Family Services</b> Scheduling Op</p> <p>New Family</p> <p><b>Family Search</b></p> <p>Certification</p> <p>Income Screening Calculator</p> <p>Family Services Analysis</p> </div> <div data-bbox="1255 493 1871 727"> <p><b>NOTE</b></p> <p>Unchecking the <b>Active Only</b> box is best practice and especially important when you have an applicant or expired participant.</p> </div> <div data-bbox="537 781 1917 1036"> <p><b>Search Criteria</b></p> <p>Search Location: State-Wide, Local Agency, Clinic (selected)</p> <p>Search Type: <input checked="" type="checkbox"/> Family, <input checked="" type="checkbox"/> Participant, <input type="checkbox"/> Caretaker, <input type="checkbox"/> Proxy</p> <p>Family ID: [ ] Last Name: xero First Name: [ ] M.I.: [ ] Telephone Number: ( ) - - Date of Birth: [ ]</p> <p>Participant ID: [ ] Medicaid Number: [ ] EBT Card Number: [ ] Online Applicant Only: <input type="checkbox"/> Active Only: <input type="checkbox"/></p> <p>Search [ ] Clear Criteria [ ]</p> </div> <div data-bbox="537 1089 1917 1416"> <p><b>Search Results</b></p> <table border="1"> <thead> <tr> <th></th> <th>Family ID</th> <th>Participant ID</th> <th>Last Name</th> <th>First Name</th> <th>M.I.</th> <th>Date of Birth</th> <th>Category</th> <th>Medicaid Number</th> <th>Status</th> <th>Certification End Date</th> <th>Parent/Guardian</th> </tr> </thead> <tbody> <tr> <td></td> <td>F05200002696</td> <td></td> <td>XERO</td> <td>CARLA</td> <td></td> <td>12/31/1999</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>F05200002696</td> <td>WA0520004437</td> <td>XERO</td> <td>CARLA</td> <td></td> <td>12/31/1999</td> <td>P</td> <td></td> <td>Applicant</td> <td></td> <td>CARLA XERO</td> </tr> <tr> <td></td> <td>F05200002696</td> <td>WA0520004438</td> <td>XERO</td> <td>GABBY</td> <td></td> <td>12/12/2017</td> <td>C</td> <td></td> <td>Applicant</td> <td></td> <td>CARLA XERO</td> </tr> <tr> <td></td> <td>F05200002696</td> <td>WA0520004439</td> <td>XERO</td> <td>JERROD</td> <td></td> <td>12/18/2018</td> <td>I</td> <td></td> <td>Applicant</td> <td></td> <td>CARLA XERO</td> </tr> <tr> <td></td> <td>F05200002697</td> <td></td> <td>XYLA</td> <td>JERI</td> <td></td> <td>12/1/1999</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>F05200002697</td> <td>WA0520004440</td> <td>XYLA</td> <td>JERI</td> <td></td> <td>12/1/1999</td> <td>B</td> <td></td> <td>Applicant</td> <td></td> <td>JERI XYLA</td> </tr> <tr> <td></td> <td>F05200002697</td> <td>WA0520004441</td> <td>XYLA</td> <td>KELLY</td> <td></td> <td>4/1/2019</td> <td>I</td> <td></td> <td>Applicant</td> <td></td> <td>JERI XYLA</td> </tr> </tbody> </table> <p>Edit Applicant [ ]</p> </div>		Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Category	Medicaid Number	Status	Certification End Date	Parent/Guardian		F05200002696		XERO	CARLA		12/31/1999							F05200002696	WA0520004437	XERO	CARLA		12/31/1999	P		Applicant		CARLA XERO		F05200002696	WA0520004438	XERO	GABBY		12/12/2017	C		Applicant		CARLA XERO		F05200002696	WA0520004439	XERO	JERROD		12/18/2018	I		Applicant		CARLA XERO		F05200002697		XYLA	JERI		12/1/1999							F05200002697	WA0520004440	XYLA	JERI		12/1/1999	B		Applicant		JERI XYLA		F05200002697	WA0520004441	XYLA	KELLY		4/1/2019	I		Applicant		JERI XYLA
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# Cascades Steps Cancelling Appointments



## Get to Family Appointments:

- On the **Family Demographics** screen, select **Scheduling System** in the Quick Links, then **Family Appointments**.
- Cascades will bring up the **Family Appointments List** screen.

The screenshot shows the 'XYLA Family' profile page. The left navigation pane includes 'Scheduling System' with sub-links for 'Family Appointments', 'Quick Appointments', and 'Clinic Master Calendar'. The 'Family Appointments' sub-link is highlighted with a red box. A red arrow points from this box to a separate 'Scheduling System' menu box below.

The 'Scheduling System' menu box contains three options: 'Family Appointments', 'Quick Appointments', and 'Clinic Master Calendar'. The 'Family Appointments' option is circled in red, and a red arrow points from it to the 'Family Appointments List' screen below.

The 'Family Appointments List' screen displays two appointment entries. The title 'Family Appointments List' is circled in red. Each entry includes a participant icon, name, appointment date and time, location, participant ID, status, and action buttons (Comments, Reschedule, Cancel).

Participant	Appointment	Participant ID	Status	Comments	Reschedule	Cancel
<b>JERI XYLA</b> Breastfeeding L21C01 - Kitsap Comm Resources-Bren	<b>7/23/2019</b> (11:00 AM to 11:30 AM) Initial Certification	Participant ID: WA0520004440 Date of Birth: 12/1/1999 Age: 19 years and 7 months	Status: Applicant Certification Period: Next Food Issuance Date:			
<b>KELLY XYLA</b> Infant L21C01 - Kitsap Comm Resources-Bren	<b>7/23/2019</b> (11:30 AM to 12:00 PM) Initial Certification	Participant ID: WA0520004441 Date of Birth: 4/1/2019 Age: 3 months	Status: Applicant Certification Period: Next Food Issuance Date:			

5. On the **Family Appointments List** screen, select **Cancel** for any one of the participants.

**Family Appointments List**

Participant Name	Appointment Date/Time	Participant ID	Status	Comments	Reschedule	Cancel
JERI XYLA Breastfeeding L21C01 - Kitsap Comm Resources-Bren	7/23/2019 (11:00 AM to 11:30 AM) Initial Certification	WA0520004440 Date of Birth: 12/1/1999 Age: 19 years and 7 months	Applicant Certification Period: Next Food Issuance Date:			
KELLY XYLA Infant L21C01 - Kitsap Comm Resources-Bren	7/23/2019 (11:30 AM to 12:00 PM) Initial Certification	WA0520004441 Date of Birth: 4/1/2019 Age: 3 months	Applicant Certification Period: Next Food Issuance Date:			

A pop-up window called **Appointment Cancellation With Future Appointment(s) - Confirmation** appears.

- All participants in the family are checked-marked by default.

**Appointment Cancellation With Future Appointment(s) - Confirmation**

Select All	Family Name	Participant Name	Appointment Type	Scheduled Date	Scheduled Start Time	Scheduled End Time	Total Items: 2
<input checked="" type="checkbox"/>	JERI XYLA	JERI XYLA	Initial Certification	7/9/2019	9:00 AM	9:30 AM	
<input checked="" type="checkbox"/>	JERI XYLA	KELLY XYLA	Initial Certification	7/9/2019	9:30 AM	10:00 AM	

*Note: Appointments will be removed from pending list (if any)*

Cancellation Reason:

Buttons: Cancel Appointment(s), Cancel

6. Uncheck the box by participant's name if an appointment shouldn't be cancelled.

**Appointments to Cancel**

Select All	Family Name	Participant Name
<input type="checkbox"/>	JERI XYLA	JERI XYLA
<input checked="" type="checkbox"/>	JERI XYLA	KELLY XYLA

7. Select a **Cancellation Reason** in the drop-down.

**Cancellation Reason** ★

Illness  
Transportation Issues  
Work schedule  
Delivered baby  
Schedule conflict  
No longer needs services

8. Select **Cancel Appointment(s)** button.

**Cancellation Reason** ★

Schedule conflict

Buttons: Cancel Appointment(s), Cancel

### METHOD 2

If you know the date of the appointment to cancel:

1. Select **Scheduling** from the Menu bar, then **Clinic Master Calendar**.

**Note:** Calendar defaults to current month's view.

2. Find the date of the appointment(s) to be cancelled.
3. Double-click the green-colored date field of your choice in the **Month** Schedule-view to get to the **Day** Schedule-view of the calendar.
4. Find the family whose appointment you want to cancel.

The screenshot illustrates the steps to cancel an appointment. It shows the 'Scheduling' menu with 'Clinic Master Calendar' selected. The 'Month' view for July 2019 is shown, with a red box around the date July 16th. A red arrow points to the 'Day' view for Tuesday, July 16, 2019. In the day view, a red box highlights the appointment for 'CARLA XERO - Initial Certification'.

Time	Family Name	FBI	ME-I	IC
8 AM	ETTA YOKES	2	6	4
8:15	ERWBI YOKES - Initial Certification	2	6	4
8:30	ETTA YOKES - Initial Certification	2	6	4
8:45	ETTA YOKES - Initial Certification	2	6	4
9 AM	BOBBY JACKSON	2	5	3
9:15	ANNETTE JACKSON - Initial Certification	2	5	3
9:30	BOBBY JACKSON - Initial Certification	2	5	3
9:45	JACKIE JACKSON - Initial Certification	2	5	3
10 AM	SUSIE JACKSON - Initial Certification	2	6	4
10:15	SUSIE JACKSON - Initial Certification	2	7	5
10:30	GREG ZONKERS	2	6	4
10:45	TRANA SU - Initial Certification	2	6	4
11 AM	TRANA SU - Initial Certification	2	7	5



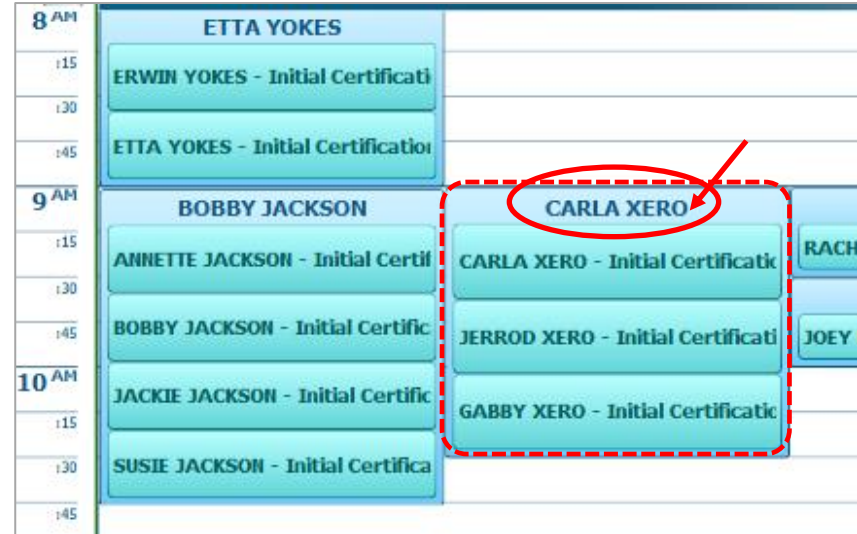
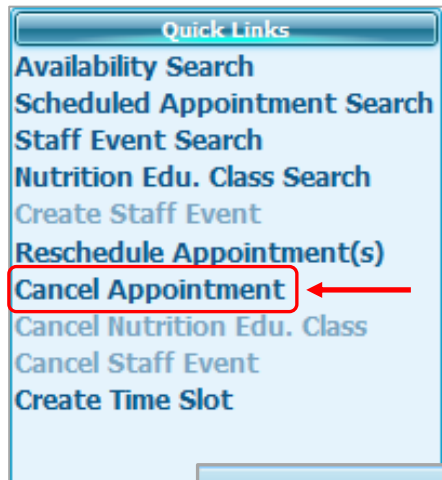
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- Select the **family's name** to start the running dashed lines.
- In the **Master Calendar's Quick Links** section (bottom, left side of screen), select **Cancel Appointment**.
- The **Appointment Cancellation With Future Appointment(s) – Confirmation** pop-up screen will appear.
- Follow **Method 1 – Steps 6-8** to cancel appointment(s).

**NOTE**

The **Cancel Appointment** Quick Link stays greyed out until you select a family's name.



**Appointment Cancellation With Future Appointment(s) - Confirmation**

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For persons with disabilities, this document is available on request in other formats.

To submit a request, please call 1-800-525-0127 (TDD/TTY call 711)

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