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For patients that have been checked in for their office visit, seen by the provider, and is determined to reschedule treatment, follow the steps outlined below to reschedule treatment.

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### Rescheduling Workflows

The workflow for rescheduling a patient is dependent on if the patient has been checked-in for their appointment(s) or not.

- To reschedule treatment for a patient who has been scheduled and **NOT** checked in for their appointment(s) – follow the steps outlined in the following flyer: [Rescheduling a Day of Treatment](#).
- To reschedule a patient who **IS** checked-in, been seen by the provider, determined to reschedule treatment, and a provider visit is required – follow the steps outlined in **Rescheduling Checked-In Patients Workflow (New Provider Visit Required)** section of the flyer below.
- To reschedule a patient who **IS** checked-in, been seen by the provider, and determined to reschedule treatment, and a new provider visit is **NOT** needed – follow the steps outlined in the **Rescheduling Checked-In Patients Workflow (NO New Provider Visit Required)** section of the flyer below.

### Rescheduling Checked-In Patients Information

Rescheduling patients who have been checked-in from the Clinic Scheduling and Tasks Phase addresses several issues identified with checked-in appointments.

- The original Day 1 appointments (i.e., lab and/or provider visit) that have been checked-in:
  - Do **NOT** display in the Copy Day of Treatment window; therefore, does not require the provider to remember to uncheck the items listed as **Checked-In** when you click Adjust All, so it does not move those appointments.
  - Do **NOT** get removed or re-sent to the request queue.
  - Do **NOT** get removed from the appointment book.
  - The copied days of treatment for the new office visit and new lab visit have scheduling orders sent to the request queue and the dates in all the phases have been updated to reflect the new dates.

### Rescheduling Checked-In Patients Workflow (New Provider Visit Required)

To reschedule a patient who **IS** checked-in, been seen by the provider and determined to reschedule treatment, and a new provider visit is needed, follow the steps listed:

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**STEP 1:** Go to the **Clinic Scheduling and Tasks** phase and locate the day of treatment for today's appointment.

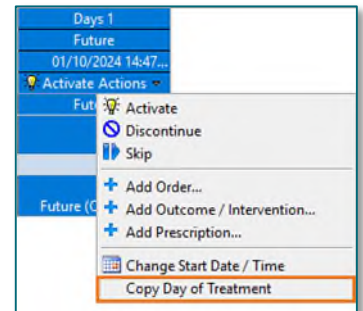
**NOTE:** It is important to use the **Clinic Scheduling and Tasks** phase to avoid the issues listed above from occurring.

**STEP 2:** Click the **Actions** dropdown for the day of treatment and select **Copy Day of Treatment**.

**STEP 3:** Enter the new **Start Date/Time** to see the patient again.

**STEP 4:** Click **Adjust All** to adjust the other treatment periods and phase(s).

- This will allow rescheduling the linked phases (i.e., Chemotherapy, Labs, and Clinical Scheduling and Tasks) at the same time.



**STEP 5:** Document a **Reschedule Reason**. Select an appropriate reason from the list.

- Enter a comment in the **Comment** field to include additional details, as applicable.

Copy - Change Start Date/Time

Change Start Date/Time: Clinic Scheduling and Tasks (Days 1, 3) - Copy of Days 1

\*Est. Start Date/Time:  
01/18/2024 1447 EST

To change the start date/time of a single treatment period/non-DoT phase, enter a new date below.

**Adjust All** Automatically adjusts the start date for the selected treatment periods and phase(s)

<input checked="" type="checkbox"/> Adjust	Description	Start Date/Time	Appointment Information	<input checked="" type="checkbox"/> Request New Appointment
<input checked="" type="checkbox"/>	Chemotherapy (Days 1 to 2)			
<input checked="" type="checkbox"/>	Labs (Days 1)			
<input checked="" type="checkbox"/>	Clinic Scheduling and Tasks (Days 1, 3)			
	Days 3	*Est. 01/20/2024 14:47 EST		

\*Estimate of Actual Treatment Date

\*Reschedule Reason:  
Reschedule Reason and Comment applies to initiated/future phase(s) only

Comment:

OK Cancel

**NOTE:** If **NO** lab orders are needed for the next visit, continue to Step 7.

**STEP 6:** If new labs are needed for next visit, go to the **Labs Phase**, locate the day of treatment for today's appointment.

- Click the **Actions** dropdown and select **Copy Day of Treatment**.

- Adjust the estimated **Start Date/Time** to ensure it matches the date used for the copied day of treatment in the Clinic Scheduling and Tasks phase.
- Do **NOT** click Adjust All.
- Click **OK**.

**STEP 7:** Click **Orders for Signature**.

**STEP 8:** Click **Sign**, then click **Refresh**.

### **Rescheduling Checked-In Patients Workflow (NO New Provider Visit Required)**

To reschedule a patient who **IS** checked-in, been seen by the provider and determined to reschedule treatment and a new provider visit is **NOT** needed – follow the steps outlined to: 1) change the start date and time for treatment and 2) order new labs for the next visit, if needed.

#### ➤ **Change the Start Date and Time for Treatment**

**STEP 1:** Navigate to **Orders** tab in the menu and go to the applicable cycle of the regimen.

**STEP 2:** Click the **Chemotherapy** phase.

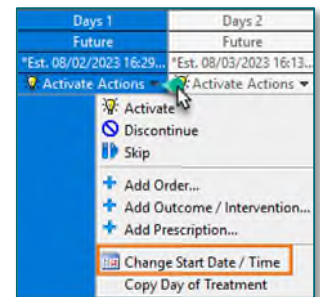
**STEP 3:** In the Day of Treatment column needing to be rescheduled, click the **Actions** dropdown and select **Change Start Date/Time**.

**STEP 4:** Enter the new **Start Date/Time** to reschedule the day of treatment to.

**STEP 5:** Place a check in the box for **Request a new appointment time**.

**STEP 6:** Click **Adjust All** to adjust the selected treatment periods and phase(s).

- This allows the ability to reschedule the linked phases (Chemotherapy, Labs, and Clinical Scheduling and Tasks) at the same time.



**NOTE:** If rescheduling only a single Day of Treatment and the dates of the remaining days do not need to be adjusted, do **NOT** click the **Adjust All** button.

**STEP 7:** Document **Reschedule Reason**. Select a reason from the list.

**STEP 8:** Use the Comment field to provide additional details for rescheduling.

**STEP 9:** Click **OK**.

**NOTE:** If **NO** lab orders are needed for the next visit, continue to Step 11.

➤ **Ordering New Labs for the Next Visit**

**STEP 10:** If new labs are needed for next visit, go to the **Labs Phase**, locate the day of treatment for today's appointment.

- Click the **Actions** dropdown and select **Copy Day of Treatment**.
- Adjust the estimated **Start Date/Time** to ensure it matches the updated treatment date.
- Do **NOT** click Adjust All.
- Click **OK**.

**STEP 11:** Click **Orders for Signature**.

**STEP 12:** Click **Sign**, then click **Refresh**.