How do I delete an appointment?

07/24/2024 3:55 pm EDT

In the event you need to delete an appointment, you can do so from the calendar or the patient chart. If you need to recover a deleted appointment please refer to this article.

From the calendar, open the appointment you need to select **Delete**. A window will open up asking if you are sure. Deleting an appointment will also delete the clinical note and claim information. Click **Delete** to complete the process. The appointment will be removed from your calendar.



You can also delete an appointment from the patient's chart in the **Appointments** section. Open the chart. Select **Appointments** from the menu on the left. Click **Edit Appointment** to open the appointment window. Select **Delete**. When you refresh the page, the appointment will be gone.

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You can require a reason for deleting the appointment if you would like. This needs to be set up under Account > Offices. Select the office you would like to add this requirement. Next, check the box for Require reason when deleting appointments and Save. Repeat for other offices.

Basic Billing Online Sche	edule Providers eRx	
A Warning: Changing the addr	ress of an office affects all previous a	ppointments in that office.
Office name (cohoduling)		
Office name (scheduling)	Office 4	
Facility name		Used in HCFA box#32 and UB04 box#2. Leave it blank if same to Office name (Scheduling)
Primary Provider	Dr. James Smith \checkmark	
Country	UNITED STATES \checkmark	
Address	328 Gibraltar Dr	
	1	
Zip Code	94089	
State	California ~	
City	Sunnyvale	
Office Phone	(650) 555-5555	Not validated. Click here to verify with a test call.
Fax		
Formatted Address		Not editable. Only valid for US addresses.
Number of Exam Rooms	1 ~	
Exam Name 1	Exam 1	Z Allow Online Scheduling 🗌 Excluded from Meaningful Use 🗌 Archived from Calendar 🗌 Is Telehealth
Office hours start	8:00 am 🗸 🗸	
Office hours end	8:00 pm 🗸 🗸	
Require reason when deleting appointments		
Save		

Now, a text box will appear for the user to enter a reason when deleting the appointment.

Schedule App	ointment					20			
Appointment	Billing Elic	Are you sure you want to delete this appointment? This will also delete the clinical							
Ту	pe Appointment 	Please provide a reason for deleting this appointment							
Patient Stateme	ent Balance: \$410.00		726]						
Secondary Insu	rance: PAI California				orization:				
Provider	Dr. James Smith			Cancel Delete					
Patient	Laurie T. Sample -		Onice:	Once I					
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Consent	× HIPAA Data Use	Agreement (default)		C View Clinical No	te				
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Recurring Appointment A scheduled appointment cannot be converted to a recurring series.