Cancelled Group/Individual Services by Clinic/Staff

This is a guide for documentation of cancelled individual/group services by clinic/staff. This cancel reason is selected when services are cancelled due to clinic closures, staff out of office/sick, and for groups with only 1 client in attendance.

1. Select "**Cancel**" for the **Status:**

2. The **Cancel Reason** field will become available when you select Cancel. Select the option, "**Agency/Staff Cancelled**".

*For **Group Services**: Select "**Agency/Staff Cancelled**" for the client that showed up to group and was offered an individual service and select "No Show" for clients that did not show.

Group Service Detail

Service Note

✕	Sa Client,... (400014)
✕	Sa Client,... (400012)

Service Information   **Custom Fields**   **Billing Diagnosis**   **Add-On Cod**

Procedure	Group Counseling ▾		Set All	Set Some
Start	9:00 AM	Face to Face Time 60.00 Minutes	Set All	Set Some
🔧 Status	Cancel ▾		Set All	Set Some
Cancel Reason	▾		Set All	Set Some
Program				t Some
Clinician				t Some
Attending				t Some
Mode Of Delivery				t Some
Billable				t Some
Transportation Se...				t Some

Dropdown list:
- **Agency/Staff Cancelled**
- Consumer Cancelled (Childcare/Dependent Care Issue)
- Consumer Cancelled (Conflict)
- Consumer Cancelled (Illness)
- Consumer Cancelled (Other Reason)
- Consumer Cancelled (Reason Unknown)
- Consumer Cancelled (Transport Issues)

Group Service Detail

Service Note

Clients   ☐ Show Clients With Errors   🔍 ➕ ☰

✕	Sa Client,... (400014)
✕	Sa Client,... (400012)

Service Information   **Custom Fields**   **Billing Diagnosis**   **Add-On Codes**

Procedure	Group Counseling ▾		Set All	Set Some
Start	9:00 AM	Face to Face Time 60.00 Minutes	Set All	Set Some
Status	Scheduled ▾		Set All	Set Some
Cancel Reason			Set All	Set Some
Program			Set All	Set Some
Clinician			Set All	Set Some
Attending			Set All	Set Some
Mode Of Delivery			Set All	Set Some

Dropdown list:
- Cancel
- Complete
- Error
- **No Show**
- Scheduled
- Show

3. Change the **Face-to-Face** field to 1-minute, in both the staff and client service information section.

3. The Note tab will gray out when you select cancel for the **Status** field, just as a No-Show note.

Individual Service Note:

Group Service Note:

Group Service Detail

Service   **Note**

Group Note   **Client Note**   **Sign My Notes** Co-S

☐ Only Show clients where I am the Note Author   ☐ Only show notes with Validation Errors

Hide Clients

Sa Client... (400014)   **Note**   **Treatment Plan Goals Addressed**   **Co-Signers**

Sa Client... (400012)

The Client's Service Status is Cancel, so Note tab is not Visible.

4. For an **individual service**, write your note narrative in the comment box at the bottom of the service note.

Service   Note   **Billing Diagnosis**   **Add-On Codes**   **Warnings**

Service

Status	Cancel
Program	5th St Youth CM 1.0 (5713)
Procedure	ⓘ Individual Counseling **Modifier...**
Location	Office
Clinician	Hernandez, Alexandra Mari...
Mode Of Delivery	
Cancel Reason	Agency/Staff Cancelled
Evidence Based Practices	
Transportation Service	No

Custom Fields

Interpreter Service

Interpreter has been scheduled ○ Yes ○ No   Language

Interpreter Agency Scheduled

Comments

5. For a **Group Service cancelled by clinic**, launch a "Client Non- Billable Must Document" service note for each client to document reason for cancellation & any additional information needed. For example, a narrative for group cancelled by clinic would be, "Group cancelled due to clinic closure due to COVID-19 precautions". Please note that we submitted a request to have a note field available for Cancelled/No-Show Group Services.

   *For **Group Service cancelled due to one client in attendance**, staff can launch a "Client Non-Billable Must Document" service for No-Show clients, only if staff has additional information to document for the client (not required). For the client in attendance, launch an Individual Counseling service note, and document that the group service was cancelled due to only having one person in attendance.