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.

### METHOD 1
If you need to find the date of the appointment to cancel:

**Search for the family record:**
1. Select Family Services, then Family Search.
2. Add your Search Criteria:
   - Check-mark Family and Participant boxes.
   - Enter a few letters or all of last and/or first name.
   - Uncheck Active Only box.
   - Select Search button.
3. In Search Results box, select one of the participants you want.

Select pencil icon to open the participant’s record.

**NOTE**
Unchecking the Active Only box is best practice and especially important when you have an applicant or expired participant.
Cascades Steps
Cancelling Appointments

Get to Family Appointments:

3. On the Family Demographics screen, select Scheduling System in the Quick Links, then Family Appointments.

4. Cascades will bring up the Family Appointments List screen.
5. On the **Family Appointments List** screen, select **Cancel** for any one of the participants.

A pop-up window called **Appointment Cancellation With Future Appointment(s) - Confirmation** appears.
- All participants in the family are checked-marked by default.

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

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

8. Select **Cancel Appointment(s)** button.
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.
5. Select the **family’s name** to start the running dashed lines.

6. In the **Master Calendar’s Quick Links** section (bottom, left side of screen), select **Cancel Appointment**.

7. The **Appointment Cancellation With Future Appointment(s) – Confirmation** pop-up screen will appear.

8. 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.

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