

Reference Number: <i>UHB 552</i> Version Number: 1	Date of Next Review: <i>26/05/2026</i> Previous Trust/LHB Reference Number: <i>N/A</i>
Clinic Cancellation Protocol	
Introduction and Aim	
<p>It is important clinic cancellations are kept to a minimum, and are monitored carefully - in particular short-term (less than 6 weeks) cancellations. It is anticipated that as a result of adherence to this protocol the number of outpatient clinics being cancelled outside of exceptional circumstances will reduce and support improvements on how to manage clinic demand and provision.</p>	
Objectives	
<ul style="list-style-type: none"> • To describe a protocol for the cancelling of clinics throughout the Mental Health Clinical Board (MHCB), when forward planning has not allowed rescheduling of that work routinely, with to provide pre-cancellation scrutiny of short-term cancellation requests • To monitor the number of clinics cancelled within and outside the respective notice periods and work with the clinical teams to understand and help improve overall Outpatient Clinic delivery and provision. • Monthly PARIS reports will be made available to team managers to review performance against standards, check on rebooking, and also review the 'paperwork associated with short term cancellations • Where there are shortfalls in performance, these will be escalated to the relevant medical managers, and other managers as appropriate. 	
Scope	
<p>This protocol applies to all Mental Health Clinical Board areas running medical staffed outpatient clinics, and applies to medical staff, any staff supporting those clinics and the leadership teams at directorate and clinical board level. It also applies locum/agency staff working within UHB facilities/under contract to the UHB.</p>	
Equality and Health Impact Assessment	<i>An Equality and Health Impact Assessment (EHIA) has not been completed.</i>
Documents to read alongside this Procedure	<i>N/A</i>
Approved by	<i>Mental Health Clinical Board</i>

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Disclaimer

If the review date of this document has passed please ensure that the version you are using is the most up to date either by contacting the document author or the [Governance Directorate](#).

Summary of reviews/amendments			
Version Number	Date of Review Approved	Date Published	Summary of Amendments
<i>1</i>	<i>26/05/2023</i>	<i>Feb 2026</i>	<i>New Document</i>

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Introduction

Outpatient clinical work is a fundamental part of health care, and its reliable operation vital. The cancellation of routine clinical work can have a significant impact on service delivery, inconveniences patients, and increases clinical risk.

Clinic Cancellations, throughout the UHB, are requested via cancellation forms. The UHB requires an audit trail supporting late cancellations. An effective procedure also assists with performance measures for the cancellation of clinics within 6 weeks, a target, set out by the Welsh Government.

Other than in exceptional circumstances as approved on a case by case basis by the relevant Clinical Board Director, outpatient clinics will only be cancelled if a minimum of 6 weeks' notice is given.

(Patient Access Policy Handbook - Section 8.2.1)

Practitioners and managers have a duty to ensure that Capacity Plans, Reconciliation of Job Plans and Clinical Rotas are prepared, reviewed and monitored frequently to ensure that clinics run as necessary to meet patient needs and minimise the disruption to clinical, administration and patient time wherever possible.

Protocols

The MHCB has put in place:

1. In keeping with other areas, has adopted a NEW clinic cancellation protocol
2. A 'paper' 6/52 cancellation monitoring mechanism at directorate level
3. A PARIS EPR monitoring mechanism at team level, with whole service option (Appendix 4)

Clinic Cancellation Protocol

The MHCB will utilise a simple form (appendix 1) for internal use and authorisation. The process applies when cancelling and reducing clinics, irrespective of whether a 6-week notice is given.

Cancelling a clinic within six weeks of appointment date (see flowchart – Appendix 3)

1. All parts of the Clinic Cancellation Form (appendix 1) must be completed. Partially completed forms and incorrectly completed forms will be returned. (Reasons for cancellation – see appendix 2)
2. The form should be emailed directly to the medical secretary / clinic administrator
3. When less than 6 weeks' notice, discussion with the likely signatory is recommended. The form should be emailed to the Clinical Director, or a nominated acting authority, and copied to the Directorate Office.
4. Once authorised by the Clinical Director or authorised nominee, the forms will be electronically returned to the practitioner and forwarded to the relevant secretary / administrator with a copy kept at the Directorate Office.

5. Directorates will keep a record of short-term cancellations to allow cancelled clinic reports to be validated and trends in late cancellations be monitored, using a designated PARIS report detailing all clinic cancellations in any given month.

6. Local clinical teams will maintain a copy of all clinic cancellation requests which will facilitate retrospective audit.

7. Local administrative teams will NOT cancel any clinics with less than 6 weeks' notice without authorisation of the Clinical Director or nominated authority. If such requests are received directly, they will be returned to the Clinical Director for consideration.

8. Administrative teams will process cancellations within 3 days of receipt of valid requests.

9. The Clinical Board and Directorates will regularly audit cancellations of less than 6 weeks' notice and the above procedure.

10. Local clinical teams will receive monthly PARIS reports, and can run bespoke PARIS reports – to ensure efficient running of outpatients, with appropriate clinic cancellation.

Appendix 1: Cancellation Form

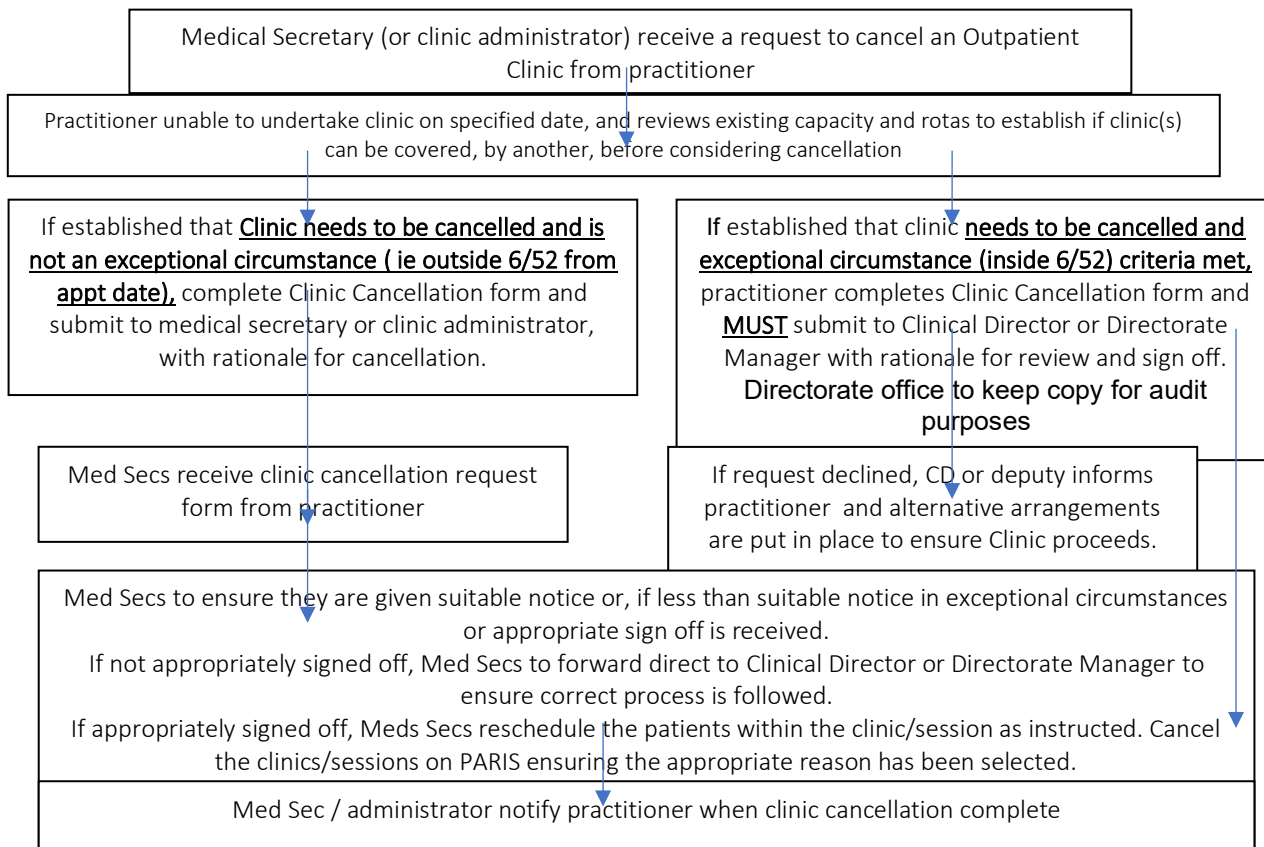
APPENDIX 1		Outpatient Clinic	
Cancellation Form		All sections MUST be completed fully	
Name of practitioner running clinic			
Date of clinic		Clinic Code (if any)	
Cancellation Request Date		No. of appointments to be cancelled	
Reason for cancellation (please circle one) NOTES: Guidance is available on the choices Choices correlate with PARIS appointment booking)	A/L: Junior / consultant / other (please indicate grade)	COVID 19 Client Cancel	Meetings
	Appointment moved forward	COVID 19 Organisation cancelled	Patient deceased
	Appointment not needed	Other Leave (consultant/Jnr)	Seen by a different consultant
	Client Cancelled	Dr on call rota	Session re-organised
	Client is in hospital	Equipment unavailable	Staff Illness
	Client Refused	Medical Audit	Staff vacancy
	Consultant emergency/ Emergency Other	Medical Exams	Study Leave (consultant/Jnr)
Further notes on reasons for cancellation request	N.B. (this section must be completed for clinics cancelled with less than six weeks' notice)		
Have you considered alternative solutions (if so please specify) (please circle)	Yes	No	notes
Have you considered alternative HCPs (Nurse/Nurse prescriber or Pharmacist led clinic) (please circle)	Yes	No	notes
Special Instructions e.g. - Medical Secretaries to reschedule (Date) - Medical Secretaries to inform patients			
Cancellation request Completed by		Date	
Authorised by			
Date			
Cancellation authorised (please circle) Ensure all sections completed before signing	Yes	No	
(Reason for decision)			
Clinic cancellation administered by		Date of completion	

Appendix 2: Cancellation Reasons

PARIS reason	Definition	Notes
A/L Junior staff A/L Consultant A/L Other	When annual leave has been booked after clinic has already been arranged.	Please do not use A/L other for any medic appointment cancellations this is for non-medical appointments only
Appointment moved forward	Most commonly used when clinical need indicated sooner appointment needed	Please do not use this without explaining reason in free text 'appointment notes section' on appointment booking module/cancellation page
Appointment not needed	This could be because someone else has reviewed and no longer requires follow up	Rationale why appointment not needed must be documented as above
Client Cancelled	Patient unable to attend, could be illness or other commitments	Reason must be documented clearly as above
Client is in hospital	Patient unable to attend due to physical or psychiatric admission to hospital	Reference who notified, location of patient and if there is any discharge date planned
Client Refused	For instances where clinician feel patient needs to be seen and team actively trying to encourage attendance, however client declines to be seen	Need to document supporting information about attempts to engage and follow up plan
Consultant emergency/ Emergency Other	This could be a short notice cancellation that could not be predicted e.g. car broken down, family emergency	Reason must be documented clearly as above Emergency Other for non-medical appointments
COVID 19 Client Cancel	This could be due to symptoms, positive test or contact	Reason must be documented clearly as above
COVID 19 Organisation cancelled	This relates to any COVID related service disruption- e.g. staff/equipment unavailable	Reason must be documented clearly as above
Other Leave (consultant/Jnr)	Any other leave not identified previously e.g. carers leave	Reason must be documented clearly as above
Dr on call rota	Commonly Junior Dr when availability unknown and clinics already booked	Document details of when notified and by whom
Equipment unavailable	Where equipment required if not available for clinic e.g. ECG machine for ECG clinic	Document details of why not available and who made you aware
Medical Audit	When cancelling clinic due to audit.	Audit should be arranged around clinic/before booking therefore document why clinic being cancelled, date notified and who authorised
Medical Exams	When cancelling due to medical exams	Exams date should be known in advance of clinic booking therefore document why clinic being cancelled, date notified and who authorised
Meetings	Cancellation due to meeting taking priority	Meeting should be arranged around clinic/before booking therefore document why clinic being cancelled, date notified and who authorised
Patient deceased	Patient confirmed as deceased	Document details of notification (date and by whom)
Seen by a different consultant	This should be used when original appointment is cancelled and an alternative medic undertakes appointment instead	Details of alternative appointment should be documented in appointment notes
Session re-organised	This could be due to wider change for example changing clinic day due to ward round/room booking	Rationale must be explained in appointment notes before re-organising
Staff Illness	Medic undertaking clinic is unwell and unable to carry out clinic	Detail of options considered before cancelling and what alternative arrangements have been made
Staff vacancy	Where unfilled vacancy has caused clinic to be cancelled	Essential that senior authoriser aware and document they have agreed cancellation and alternative options considered
Study Leave (consultant/Jnr)	Medic has study leave on clinic day and requires session to be rearranged	Should be arranged around clinic/before booking therefore document why clinic being cancelled, date notified and who authorised

Appendix 3: Clinic Cancellation Flowchart

Confirms the exact process to adopt when deciding whether to cancel an Outpatient clinic and is appropriate to all areas of the MHCb that booking outpatient clinic appointments.

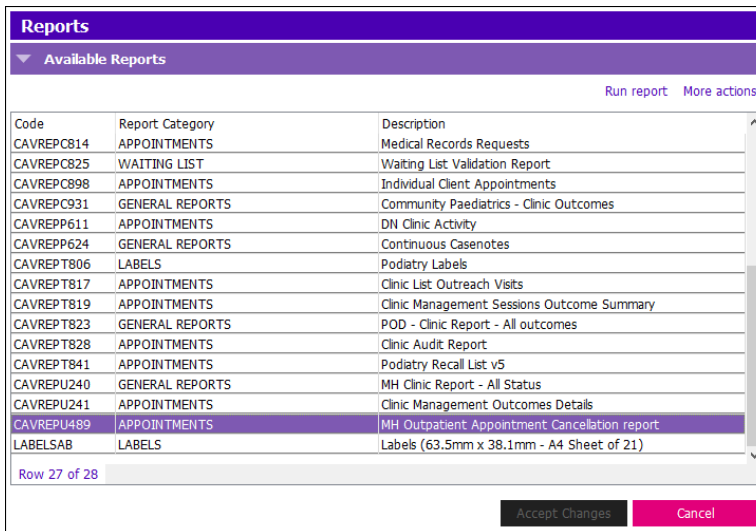


Appendix 4: PARIS Reports

1. From the home screen – open appointment booking
2. Choose reports:



3. Select MH outpatient appointment cancellation report



4. Choose options before running report

Start Date

End Date

Date filter by:

Team

Run Report Cancel

5. The report presents summary information followed by detailed patient cancellation detail



		AIL JUNIOR STAFF	ANNUAL LEAVE (CONSULTANT)	ANNUAL LEAVE (OTHER)	APPOINTMENT MOVED FORWARD	APPOINTMENT NOT NEEDED	CLIENT CANCELLED	CLIENT IS IN HOSPITAL	CLIENT REFUSED	CLINICIAN CANCELLED	CONSULTANT EMERGENCY	ORGANISATION CANCELLED	OTHER LEAVE (CONSULTANT)	PATIENT DECEASED	SEEN BY A DIFFERENT CONSULTANT	SESSION RE-ORGANISED	STAFF ILLNESS	STAFF VACANCY	STUDY LEAVE (CONSULTANT)	Total
FORENSIC	Cancelled				13	6	2													21
	Rebooked				13	6	2													20
GABALFA CMHT	Cancelled		2		2	2	12	1												23
	Rebooked		1		2	2	11	1									2	2		17
HAMADRYAD CMHT	Cancelled				7	1	9	2		16				1			9	1		46
	Rebooked				6	1	8	2		14				1			9	1		38
LINKS CMHT	Cancelled				5	4	1	1		4						1	2			18
	Rebooked				5	3	1	1		4						1	2			15
MHSOP OUTPATIENTS	Cancelled				1		2	3						1			5			12
	Rebooked				1		2	1						1			4			7
PENDINE CMHT	Cancelled		6		9	3	12	2	2	8		2		1			2			47
	Rebooked		6		8	3	12	2	1	7		2		1			2			38
PENTWYN CMHT	Cancelled	1		5	2	2	6	1		2	3		1	1					2	37
	Rebooked	1		2	2	2	6	1		2	3		1	1			2		11	31
PRIMARY MH SUPPORT	Cancelled				26	3	18			12							2			82
	Rebooked				14	2	9			12							2		21	57
VALE LOCALITY	Cancelled		1	1	9	4	18	2		2										68

PARIS ID	PERSONS NAME	APPT DATE	CANCELLED ON	DAYS NOTICE	OUTCOME	NEXT APPT DATE	NEXT APPT STATUS	NEXT APPOINTMENT OUTCOME
HAMADRYAD CMHT								
Clinic: ASSESSMENT CLINIC		Clinic: HAMADRYAD CMHT		Room: ROOM 8		Staff in Charge: CERI MOORE		
		18/05/2021	17/05/2021	1	CLIENT IS IN HOSPITAL	23/06/2021	BOOKED	
Appointment Notes (18/05/2021): f2f appt								
		25/05/2021	25/05/2021	0	CLIENT CANCELLED	03/06/2021	DNA WITH R	DID NOT ATTEND - NO RE
Appointment Notes (25/05/2021): F2F								
Clinic: CMHT CLINICS		Clinic: HAMADRYAD CMHT		Room: ROOM 2		Staff in Charge: KATE REBECCA SOUTHERN		
		19/05/2021	19/05/2021	0	CLIENT CANCELLED	21/07/2021	BOOKED	
Clinic: CONSULTANT CLINICS		Clinic: HAMADRYAD CMHT		Room: ROOM 1		Staff in Charge: BHUSHAN VAIDYA		
		05/05/2021	18/05/2021	-13	CLINICIAN CANCELLED	14/09/2021	BOOKED	
Appointment Notes (05/05/2021): Phone call with Bhushan.								
		06/05/2021	15/04/2021	21	CLINICIAN CANCELLED	13/05/2021	ATTENDED	CONSULT AND ADVISE
Appointment Notes (06/05/2021): Phone call with Beth								
		13/05/2021	05/05/2021	8	CLINICIAN CANCELLED	07/06/2021	ATTENDED	FOLLOWUP TREATMENT
Appointment Notes (13/05/2021): Phone call								