

PLANNING WORKSHEET · BUSINESS DECISIONS

Cancellation policy worksheet

Decide how your practice will handle changes before drafting a client-facing policy. This planning worksheet helps expose ambiguity; it is not a ready-made enforceable contract.

Which services, locations, and purchase types does the policy cover?

Notice period, time zone, approved contact method, and when a request is considered received.

Fee or deposit rule, amount, exceptions, and payment authorization process to review.

How remaining time and price are handled if either party is late.

How a no-show is defined, communicated, and recorded.

Draft-building prompts

Refund/reschedule options when the practitioner cancels.

Process for reasonable exceptions, access needs, emergencies, and disputes.

How cancellations affect package balances; no assumed forfeiture or expiry.

Review

Reviewer

Approved date

Local requirements checked

Next review date

SHORT CLIENT-FACING PARAGRAPH

Before you book, please read [policy link]. To request a change, contact [channel] using the name on your booking. We will confirm the available options. If we need to change your appointment, we will explain the reschedule or refund options. Questions can be sent to [contact].

Customization checklist

- ☐ The short paragraph intentionally contains no invented fee.
- ☐ Complete and review the worksheet before adding exact charges or deadlines.
- ☐ Do not introduce a cancellation fee after a client has booked.
- ☐ Keep access to consent and the right to stop a session separate from payment-policy discussion.
- ☐ Keep this worksheet with your business records; it contains no client information.

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