SOP Template: Appointment Request Intake and Documentation

This SOP details the process for **appointment request intake and documentation**, covering the procedures for receiving, recording, and managing appointment requests efficiently. It ensures accurate information gathering, proper scheduling, and systematic documentation to enhance communication, reduce errors, and improve overall client service and operational workflow.

1. Purpose

To outline standardized procedures for the intake, recording, and management of appointment requests to ensure effective scheduling, documentation, and client satisfaction.

2. Scope

This SOP applies to all staff responsible for receiving, processing, and documenting appointment requests, regardless of communication channel.

3. Responsibilities

- **Front Desk/Intake Staff:** Receive and document all appointment requests accurately and promptly.
- **Schedulers:** Review documented requests, confirm appointment availability, and communicate with clients as necessary.
- **Supervisors/Managers:** Monitor compliance with SOP and provide periodic training.

4. Procedure

1. **Receiving Appointment Requests**
    - Accept requests via phone, email, web form, walk-in, or other approved channels.
    - Greet the client courteously and verify their identity if appropriate.
2. **Information Gathering**
    - Collect essential details:
        - Client name
        - Contact information (phone/email)
        - Preferred date/time and flexibility
        - Reason for appointment
        - Relevant notes or special requirements
    - Use the approved Appointment Intake Form or system template.
3. **Appointment Scheduling**
    - Check availability using the scheduling system/calendar.
    - Offer available slots or confirm requested time.
    - Record appointment details in the scheduling system immediately.
    - Provide confirmation to the client via their preferred method (e.g., phone call, email, SMS).
4. **Documentation**
    - Document all relevant details in the designated system, including any notes about special requirements or instructions.
    - If follow-up is required (e.g., missing information), set reminders/tasks within the system.
5. **Follow-up & Communication**
    - Send appointment reminders as per organizational policy.
    - Update or reschedule appointments promptly upon client request; document all changes.

5. Documentation Requirements

Item	Description	Required?

Appointment Intake Form/System Entry	Initial client request, details, and scheduling notes	Yes
Confirmation Record	Record or copy of client confirmation sent	Yes
Change/Reschedule Log	Documentation of any schedule adjustments	As needed
Client Communication Records	Notes or copies of all communications	Yes

6. Quality Control

- Supervisors will review random entries weekly for completeness and accuracy.
- Regular training sessions will be scheduled for staff to reinforce procedures and system updates.

7. Related Documents & References

- Appointment Intake Form Template
- Client Communication Policy
- Data Privacy Policy

8. Revision History

Date	Revision	Author
2024-06-24	Initial SOP template created	SOP Team