

# Standard Operating Procedure (SOP)

## Patient Appointment Scheduling and Confirmation Procedures

This SOP details the **patient appointment scheduling and confirmation procedures**, including the process for booking appointments, verifying patient information, managing appointment calendars, sending timely reminders, handling rescheduling and cancellations, and ensuring effective communication between patients and healthcare providers. The objective is to optimize scheduling efficiency, reduce no-shows, and enhance patient experience through accurate and consistent appointment management.

### 1. Purpose

To ensure standardized, efficient, and consistent procedures for patient appointment scheduling, confirmation, rescheduling, and cancellation, so as to provide high-quality patient experience and optimal resource utilization.

### 2. Scope

This SOP applies to all staff responsible for booking, confirming, modifying, or canceling patient appointments in the healthcare facility.

### 3. Responsibilities

- **Reception Staff:** Schedule, confirm, reschedule, or cancel appointments as per procedure.
- **Healthcare Providers:** Update available scheduling slots and communicate special requirements.
- **Administrative Manager:** Oversee compliance and handle escalations.

### 4. Procedure

1. **Receive Appointment Request**
  - Via phone, website, patient portal, or in person.
2. **Verify Patient Information**
  - Confirm full name, date of birth, contact number, email address, and insurance details if applicable.
  - If new patient, register details in the system per registration SOP.
3. **Check Provider Availability**
  - Access the appointment calendar to find suitable slots.
  - Accommodate patient preferences when possible.
4. **Book Appointment**
  - Enter the appointment details (date, time, provider, reason) into the scheduling system.
5. **Confirm Appointment with Patient**
  - Immediately provide confirmation via phone, email, or SMS.
  - Supply appointment details, location, provider name, and any preparation instructions.
6. **Update Appointment Calendar**
  - Ensure calendar is accurately updated to prevent double bookings.
7. **Send Reminders**
  - Automated reminders to be sent 24-48 hours ahead via email, SMS, or phone.
  - Include instruction to contact office if unable to attend.
8. **Manage Rescheduling and Cancellations**
  - Verify patient identity before making changes.
  - Update system to reflect new appointment or cancellation.
  - Send updated confirmation or cancellation notice to the patient.
9. **Documentation**
  - Document all communications and changes in the patient's electronic record.
10. **Communication with Providers**
  - Promptly notify providers of new, rescheduled, or canceled appointments as appropriate.

## **5. References**

- Patient Registration SOP
- Privacy and Confidentiality Policy
- Electronic Health Record User Manual

## **6. Review and Updates**

This SOP must be reviewed annually, or sooner if there are changes to technology, staffing, or regulatory requirements.