Standard Operating Procedure (SOP): Appointment Request Intake and Documentation

This SOP details the **appointment request intake and documentation** process, including methods for receiving appointment requests, standardized data collection, verification of client information, scheduling protocols, and accurate record-keeping. The aim is to streamline appointment management, improve client communication, and ensure reliable documentation for efficient service delivery and follow-up.

1. Scope

Applicable to all staff members responsible for managing and documenting appointment requests.

2. Purpose

- Ensure consistent intake and documentation of appointment requests.
- Improve appointment management and client satisfaction.
- Provide a reliable record for service delivery and follow-up.

3. Methods for Receiving Appointment Requests

1. **Phone**: Direct calls to designated appointment lines.
2. **Email**: Dedicated appointments email address.
3. **Online Forms/Portal**: Secure, user-friendly submission forms.
4. **Walk-In**: In-person requests documented by reception staff.

4. Standardized Data Collection

Collect the following standardized information for all incoming appointment requests:

Field	Description
Full Name	Client's legal name
Contact Information	Phone number and/or email address
Preferred Date/Time	Date(s) and/or time(s) client is available
Service Requested	Nature of the appointment (e.g., consultation, follow-up)
Referral Source	Who referred the client, if applicable
Special Requirements	Accessibility needs, language preference, etc.
Notes	Any additional information provided by the client

5. Verification of Client Information

1. Confirm the identity of the requester, if not already an established client.
2. Repeat collected key information back to the client to confirm accuracy.
3. Update any outdated or missing details in the client record.

6. Scheduling Protocols

1. Check the availability of relevant staff/providers in the scheduling system.
2. Propose available appointment slots to the client and confirm selection.
3. Log confirmed appointment into the central calendar or practice management system.
4. Provide immediate appointment confirmation via the client’s preferred communication method.
5. If preferred slot is unavailable, offer alternative options and document the process.

7. Record-Keeping

1. Document all appointment requests (including canceled and rescheduled) in client records.
2. Maintain confidentiality and secure all client data as per HIPAA/data protection regulations.
3. Attach notes or relevant documentation to the client's file as needed.
4. Log date, time, staff member handling, and disposition of each request.

8. Quality Assurance

- Periodically audit appointment records for completeness and accuracy.
- Gather client feedback on the appointment process.
- Recommend process improvements based on audit and feedback findings.

9. References

- Data protection and privacy policies
- Practice management software manuals
- Staff training resources