SOP: Handling Urgent and Same-Day Appointment Requests

This SOP details the process for **handling urgent and same-day appointment requests**, ensuring prompt, efficient scheduling and patient prioritization. It includes criteria for identifying urgent cases, protocols for staff communication, managing appointment availability, and documentation procedures to enhance patient care and operational efficiency while maintaining service quality under time-sensitive conditions.

1. Purpose

To ensure consistent and efficient handling of all urgent and same-day appointment requests, improving patient outcomes and operational flow.

2. Scope

This SOP applies to all front desk staff, schedulers, clinicians, and relevant administrative personnel involved in appointment scheduling.

3. Definitions

- **Urgent Appointment:** Appointment required within 24 hours due to acute symptoms or risk factors.
- **Same-Day Appointment:** Appointment requested and scheduled for the same business day.

4. Procedure

4.1 Identifying Urgent and Same-Day Requests

1. Receive appointment request via phone, online portal, or in-person visit.
2. Use the **Urgency Criteria** (see Table 1) to determine if the request qualifies as urgent.
3. If unsure, escalate to the clinician or supervisor for assessment.

Table 1: Urgency Criteria Examples

Symptom/Condition	Urgency Level	Action
Severe pain, difficulty breathing, high fever	Urgent	Schedule within 24 hours or refer to ED/urgent care
Minor rash, medication refill, mild cold symptoms	Same-Day (if possible)	Offer earliest open slot today
Routine physical, annual check-up	Non-Urgent	Schedule next available slot

4.2 Scheduling Protocol

1. Check same-day/urgent appointment slots for availability.
2. If all slots are filled:
   - Consult with clinician/supervisor about overbooking or rearrangement.
   - If not possible, provide referral or alternate care options.
3. Update schedule immediately after booking.
4. Inform patient of time, location, and any instructions.

4.3 Communication

1. Document request details in the scheduling system.
2. Notify treating provider/clinician of urgent patients as soon as scheduled.
3. Keep patient informed of any changes or estimated wait times.
4. Communicate with other staff if schedule adjustments are necessary.

4.4 Documentation & Follow-Up

1. Record appointment type, urgency, time, and staff involved.
2. Document patient contact attempts and outcomes for all urgent/same-day requests.
3. Flag missed urgent requests for supervisor review.

4. Monitor daily for patterns or repeat urgent requests and report to clinical leadership.

5. Responsibilities

- **Front Desk & Scheduling Staff:** Screen and prioritize requests, document, schedule, and communicate status.
- **Clinicians/Supervisors:** Provide guidance on urgent cases and approve overbookings if necessary.
- **Administrative Leadership:** Review process compliance and update SOP when needed.

6. Quality Assurance

- Periodic audits of urgent and same-day scheduling records.
- Staff feedback on bottlenecks or workflow improvements.
- Annual SOP review and update.

7. References

- Clinic policy manual
- Appointment scheduling system user guide
- Emergency protocols and escalation chart

8. Revision History

Date	Version	Description	Author
2024-06-20	1.0	Initial SOP creation	[Your Name]