

SOP: Patient Registration and Appointment Scheduling Procedures

1. Purpose

This SOP outlines the standardized process for patient registration and appointment scheduling. It ensures accurate patient data collection, verification of insurance information, efficient booking, handling changes, and safeguarding patient confidentiality to streamline clinical workflow and enhance patient satisfaction.

2. Scope

Applicable to all administrative, front desk staff, and healthcare professionals involved in new and returning patient registration and appointment scheduling at the clinic.

3. Responsibilities

- **Front Desk Staff:** Collect and verify patient information; schedule, reschedule, and cancel appointments as required.
- **Insurance Coordinator:** Confirm and verify insurance details for all registered patients.
- **Clinic Manager:** Oversee adherence to SOP and handle escalated issues.

4. Procedure

1. **Patient Registration**
 - a. Greet patient and confirm identity using a valid government-issued ID.
 - b. Collect demographic information (*full name, date of birth, address, phone, email*).
 - c. Enter information into the electronic health record (EHR) or patient management system.
 - d. Request and scan insurance card; verify eligibility with the insurance provider.
 - e. Obtain signed consent forms and HIPAA acknowledgment.
2. **Appointment Scheduling**
 - a. Confirm preferred date/time and provider with the patient.
 - b. Check provider schedules for availability and avoid overlaps.
 - c. Book appointment in the scheduling system and generate confirmation details.
 - d. Communicate appointment details (date, time, provider, location) to the patient via preferred method (phone, email, text).
 - e. Send appointment reminders at least 24 hours before the scheduled time.
3. **Cancellations and Rescheduling**
 - a. If a patient requests cancellation/rescheduling, verify patient identity.
 - b. Locate original appointment and release or update the slot accordingly.
 - c. Offer alternative appointment options as needed.
 - d. Record cancellation reason if provided.
 - e. Send updated confirmation or cancellation notice to patient.
4. **Patient Confidentiality**
 - a. Ensure all patient data is handled in accordance with HIPAA and clinic policies.
 - b. Limit access to patient details to authorized personnel only.
 - c. Never discuss patient information in public areas.

5. Documentation

- Patient Registration Form
- Consent and HIPAA Forms
- Insurance Verification Records
- Appointment Schedules and Confirmation Logs

6. Quality Control & Audit

- Randomly audit registrations and appointments weekly for accuracy and completeness.
- Track appointment overlaps and missed appointments for process improvement.
- Document and report any confidentiality breaches immediately to Clinic Manager.

7. Revision History

Version	Date	Description	Author
1.0	2024-06-18	Initial Release	Clinic Admin

This SOP is to be reviewed annually or as workflow changes.