

Standard Operating Procedure (SOP)

Confirmation Call/Email/Text Procedures to Client/Patient

This SOP defines the **confirmation call/email/text procedures to client/patient**, ensuring timely and effective communication to verify appointments, provide necessary instructions, and reduce no-shows. It covers the timing, content, and method of communication, as well as protocols for handling confirmations, rescheduling, and cancellations to maintain efficient scheduling and enhance client/patient satisfaction.

1. Purpose

To standardize the process for confirming client/patient appointments and related communications to ensure clear, timely, and professional interactions.

2. Scope

This procedure applies to all staff responsible for scheduling and confirming appointments with clients/patients.

3. Procedure

3.1 Timing of Confirmation

- Initial appointment confirmation: Immediately upon booking (same day).
- Reminder confirmation: 24-48 hours before the scheduled appointment.

3.2 Method of Communication

Method	Criteria/Preference
Phone Call	Primary for first-time clients/patients or if preferred.
Email	If consented and preferred by client/patient.
Text Message	Preferred for quick confirmations and reminders; requires written consent.

3.3 Content of Communication

- Client/Patient name.
- Date and time of appointment.
- Location/address (if applicable).
- Any special instructions (e.g., fasting, paperwork).
- Contact information for questions or rescheduling.
- Request for confirmation/response.
- Instructions to notify if cancellation or rescheduling is necessary.

3.4 Communication Templates

Phone Call:

"Hello, this is [Your Name] from [Practice/Organization]. I am calling to confirm your appointment with [Provider] on [Date] at [Time]. Please let us know if you have any questions or need to reschedule. We look forward to seeing you."

Email/Text Message:

Dear [Client/Patient Name],
This is a reminder to confirm your appointment with [Provider] on [Date] at [Time], located at [Address]. Please reply to this message to confirm or contact us at [Contact Number/Email] if you need to reschedule or cancel.
Thank you!

3.5 Handling Responses

1. **Confirmed:** Mark as confirmed in scheduling system.
2. **No Response:** Follow up once via alternate method (if applicable) 24 hours prior to appointment.
3. **Reschedule request:** Assist with rescheduling and update records promptly.
4. **Cancellation:** Update the schedule and, if appropriate, offer the slot to another client/patient.

4. Documentation

- Record all confirmed appointments and responses in the scheduling system.
- Document attempts to contact and any relevant notes regarding communication preferences or issues.

5. Quality Control & Review

- Randomly audit communication logs monthly.
- Monitor no-show rates and adapt procedures as necessary.

6. Revision & Approval

- Review SOP annually or when process changes occur.
- Update as necessary with management approval.