

# Standard Operating Procedure (SOP)

## Patient Appointment Scheduling and Confirmation

This SOP details the process for **patient appointment scheduling and confirmation**, encompassing appointment booking procedures, patient information verification, scheduling system management, reminder notifications, rescheduling and cancellation policies, and communication protocols with patients. The goal is to ensure efficient appointment management, reduce no-shows, enhance patient satisfaction, and optimize healthcare service delivery through timely and accurate scheduling practices.

### 1. Purpose

To provide standardized guidelines for booking, confirming, rescheduling, and cancelling patient appointments to ensure accuracy, efficiency, and quality patient care.

### 2. Scope

This SOP applies to all administrative and clinical staff responsible for patient scheduling in the healthcare facility.

### 3. Responsibilities

- **Reception Staff:** Primary responsibility for appointment scheduling and confirmations.
- **Healthcare Providers:** Communicate available schedules and urgent appointment needs.
- **Patients:** Provide accurate contact information and notify facility of scheduling changes as needed.

### 4. Procedure

#### 1. Appointment Booking

- Greet the patient courteously (in person or on phone).
- Record or verify patient's full name, date of birth, address, and best contact number/email.
- Determine the healthcare service required and urgency.
- Access the scheduling system to identify available slots that meet clinical and patient needs.
- Select the appropriate time and book the appointment.
- Record the reason for visit and any special requirements.

#### 2. Patient Information Verification

- Confirm and update patient information at the time of scheduling and upon patient arrival.
- Input all data accurately in the patient management system.

#### 3. Scheduling System Management

- Maintain real-time accuracy of provider schedules in the system.
- Promptly block off unavailable slots for meetings, vacations, or emergencies.

#### 4. Appointment Confirmation & Reminder Notifications

- Send initial confirmation via preferred patient method (call, SMS, or email) immediately after booking.
- Send reminder notifications 24-48 hours before the appointment.
- Allow patients to confirm, reschedule, or cancel via the reminder system.

#### 5. Rescheduling & Cancellation Policies

- Accommodate rescheduling requests per clinic policy and provider availability.
- Document cancellation reason if provided by the patient.
- Advise patients of any fees or consequences related to late cancellations or no-shows.
- Update scheduling system and notify provider of changes as appropriate.

#### 6. Communication Protocols

- Handle all patient interactions professionally and confidentially.
- Provide appointment details (date, time, location, provider, preparation requirements).
- Document all communication attempts and outcomes in the patient record or scheduling notes.

## 5. Documentation

- Ensure all appointments, confirmations, rescheduling, and cancellations are accurately logged in the scheduling system.
- Maintain a record of notification delivery and patient responses.

## 6. Monitoring & Quality Assurance

- Regularly review appointment metrics (no-show rates, cancellations, rescheduling frequency).
- Report trends or recurring issues to management for process improvement.
- Solicit patient feedback on appointment scheduling experience.

## 7. References & Related Policies

- Patient Privacy and Confidentiality Policy
- Communication and Customer Service Standards
- Scheduling System User Manual
- No-Show and Cancellation Policy

## 8. Revision History

Date	Author	Change Description	Version
2024-06-08	Clinic Admin	Initial SOP creation	1.0