Standard Operating Procedure (SOP)

Pre-visit Scheduling and Confirmation Protocols

This SOP details the **pre-visit scheduling and confirmation protocols**, covering the processes for appointment booking, client communication, calendar management, and confirmation procedures. It ensures efficient scheduling, reduces no-shows, and enhances client satisfaction by providing clear guidelines for coordinating and confirming visits in a timely and organized manner.

1. Purpose

To establish standardized procedures for scheduling and confirming client visits, ensuring accuracy, efficiency, and client satisfaction.

2. Scope

This SOP applies to all staff members responsible for booking and confirming client appointments and managing related communications.

3. Responsibilities

- **Front Desk/Administrative Staff:** Schedule and confirm appointments, maintain accurate records, and communicate with clients.
- **Service Providers:** Review and acknowledge scheduled appointments on the calendar.
- **Supervisors/Managers:** Oversee adherence to scheduling protocols and address any issues.

4. Procedure

1. **Appointment Booking**
   - Receive appointment requests via phone, email, or online portal.
   - Verify client information (name, contact details, service required).
   - Offer available dates/times, and confirm the client's preference.
   - Enter appointment details into the scheduling system/calendar.
2. **Client Communication**
   - Send initial appointment confirmation via preferred communication method (e.g., email, SMS, phone call).
   - Include key details: date, time, location, service, and any special instructions.
3. **Calendar Management**
   - Ensure all scheduled appointments are accurately recorded and synced on all relevant calendars.
   - Mark appointments as "Confirmed" once client acknowledgment is received.
   - Update any cancellations or reschedules immediately.
4. **Confirmation Procedures**
   - Send reminder 24-48 hours prior to the visit via chosen channel.
   - Include cancellation/reschedule instructions.
   - If no response by deadline, follow up with a phone call.
   - Document confirmation or follow-up attempts in the scheduling system.

5. Documentation

- All appointment details and communications must be logged in the scheduling system.
- Record of confirmations, reminders, and follow-up actions to be maintained for at least 6 months.

6. Quality Assurance

- Periodic reviews of appointment logs to ensure protocol adherence.
- Monitor no-show rates and client feedback to improve procedures.

7. Revision History

Date	Version	Description of Change	Author

| 2024-06-30 | 1.0 | Initial draft | [Your Name] |