

# Standard Operating Procedure (SOP)

## Appointment Reminder Protocol and Schedule

This SOP defines the **appointment reminder protocol and schedule**, detailing the steps for timely and effective communication with clients to reduce no-shows and enhance appointment adherence. It covers methods of reminder delivery, timing intervals, message content standards, responsibilities of staff, and documentation procedures to ensure consistent and professional reminders tailored to different appointment types.

### 1. Purpose

To establish a standardized process for reminding clients of their scheduled appointments, thereby minimizing missed appointments and improving overall service efficiency.

### 2. Scope

This protocol applies to all staff involved in scheduling and confirming appointments with clients for the organization.

### 3. Definitions

- Reminder:** Any communication (via SMS, email, phone call, etc.) sent to a client regarding an upcoming appointment.
- No-show:** A client who does not attend a scheduled appointment without prior notice.

### 4. Responsibilities

- Administrative Staff:** Responsible for scheduling, sending reminders, documenting confirmations, and updating records.
- Supervisors/Managers:** Monitor adherence to protocol and provide training.

### 5. Reminder Methods

- SMS/Text Message
- Email
- Phone Call (as designated or upon special request)

### 6. Appointment Reminder Schedule

Appointment Type	Initial Reminder	Follow-up Reminder	Delivery Method(s)
Standard (in-office or routine virtual)	48 hours prior	24 hours prior	SMS and/or Email
New Client/First Visit	72 hours prior	24 hours prior (plus phone call as necessary)	SMS, Email, Phone Call
Group or Special Session	72 hours prior	24 hours prior	Email and SMS
High-risk/No-show History	72 hours prior	24 hours and 1 hour prior	SMS, Email, Phone Call

### 7. Message Content Standards

- Client name and appointment date/time
- Location or link to virtual session
- Instructions for rescheduling or cancellation
- Contact information for queries
- Confidentiality disclaimer as appropriate

**Sample SMS/Email Reminder:**

Dear [Client Name],

This is a reminder of your appointment with [Provider/Company Name] on [Date] at [Time].  
Location: [Address/Virtual Link].  
If you need to reschedule, please contact us at [Contact Info].  
Thank you!

## 8. Documentation Procedures

- Log all sent reminders in the client management system (date, time, method).
- Record client confirmations or cancellations.
- Note any unsuccessful reminder attempts (e.g., undelivered messages).

## 9. Special Considerations

- Adapt content and method as required for client needs (language, accessibility, privacy).
- Adjust schedule based on client feedback and no-show rates.

## 10. Review and Updates

This protocol shall be reviewed annually and updated as necessary to reflect changes in client needs, technology, or organizational procedures.