

Standard Operating Procedure (SOP): Patient Appointment Confirmation Process

This SOP defines the **patient appointment confirmation process**, detailing methods such as phone calls, emails, and SMS notifications to ensure patients are reminded of upcoming appointments. It covers scheduling communication timelines, message templates, staff responsibilities, and protocols for handling confirmations, rescheduling, or cancellations. The goal is to reduce no-shows, improve patient adherence to appointment times, and enhance overall clinic efficiency and patient satisfaction.

1. Scope

This SOP applies to all staff involved in scheduling and confirming patient appointments at [Clinic Name].

2. Responsibilities

- **Reception Staff:** Initiate and track all confirmation communications (calls, emails, SMS), update appointment status in the system.
- **Clinic Manager:** Monitor adherence to the SOP and address any process issues.
- **IT/Support:** Ensure communication systems function correctly and securely store all patient data.

3. Procedure

1. **Appointment Entry:** Register patient appointment in the clinic management system, including preferred contact methods.
2. **Confirmation Timeline:**
 - **3 Days Prior:** Send first confirmation (email or SMS).
 - **1 Day Prior:** Follow up for unconfirmed appointments (phone call or SMS).
 - **Day Of:** Optional reminder SMS/email if necessary.
3. **Message Sending:**
 - Use approved templates (see section 4).
 - Record all attempts and responses in the patient record.
4. **Handle Patient Response:**
 - If confirmed, update status to "Confirmed".
 - If rescheduling/canceling, assist patient and update calendar.
 - If no response, make a final attempt via phone call one business day before the appointment.
5. **Escalation:** Report consistent no-show patterns to clinic management.

4. Message Templates

Method	Template
Email	Subject: Appointment Confirmation - [Clinic Name]
	Dear [Patient Name],
	This is a reminder of your appointment on [Date] at [Time] with [Provider] at [Clinic Name]. Please reply to confirm, reschedule, or cancel.
	Thank you, [Clinic Name]
SMS	[Clinic Name]: Reminder - your appointment is on [Date] at [Time]. Reply YES to confirm, or call [Clinic Phone] to reschedule/cancel.
Phone Call	"Hello [Patient Name], this is [Your Name] from [Clinic Name] calling to confirm your appointment on [Date] at [Time] with [Provider]. Will you be able to attend? If not, we can help you reschedule."

5. Documentation

- Log all communications and responses in the patient management system with date, time, and method.
- Update appointment status as: Pending, Confirmed, Rescheduled, or Cancelled.

6. Quality Assurance & Compliance

- Conduct monthly audits of appointment confirmations and no-show rates.
- Ensure all communications comply with relevant privacy regulations (e.g., HIPAA).

7. Revision History

Version	Date	Description	Author
1.0	[Date]	Initial SOP release	[Author]