

# Standard Operating Procedure (SOP): Patient Appointment Confirmation and Reminder Process

This SOP describes the **patient appointment confirmation and reminder process**, detailing procedures for scheduling, confirming, and reminding patients about upcoming appointments. It includes communication methods such as phone calls, emails, and text messages to reduce no-shows and ensure timely attendance. The goal is to enhance patient engagement, improve clinic efficiency, and optimize appointment management through systematic reminders and confirmations.

## 1. Purpose

To establish a standard process for confirming and reminding patients of their appointments, ensuring optimal attendance and efficient clinic workflow.

## 2. Scope

This procedure applies to all staff responsible for scheduling, confirming, and reminding patients about their appointments.

## 3. Responsibilities

- **Receptionists/Scheduling Staff:** Schedule appointments, initiate confirmations and send reminders.
- **Clinic Manager:** Monitor compliance with SOP and address recurring issues.
- **IT Support:** Maintain and troubleshoot communication systems (phone, email, SMS).

## 4. Communication Methods

Method	Purpose	Frequency/Timing
Phone Call	Direct confirmation and reminder; allows questions.	Initial confirmation (at scheduling); 24-48 hours before appointment.
Email	Written confirmation and details; backup reminder.	Immediately after scheduling; 48 hours before appointment.
Text Message (SMS)	Quick reminder, easy to respond.	24 hours before appointment; optional additional reminder 2 hours prior.

## 5. Procedure

1. **Appointment Scheduling**
  - Record patient contact information (phone, email, SMS consent).
  - Schedule appointment in practice management system (PMS).
2. **Initial Confirmation**
  - Immediately confirm appointment details with the patient during or after scheduling by phone and/or email.
  - Provide clinic address, time, and any special instructions.
3. **Reminder Notifications**
  - Send first reminder via email or SMS 48 hours before appointment.
  - Send second reminder via SMS or phone call 24 hours before appointment.
  - Optional: Final reminder SMS 2 hours before appointment if system supports.
4. **Patient Response Handling**
  - If patient confirms, mark as "Confirmed" in PMS.
  - If patient cancels or requests rescheduling, update appointment status and offer alternate times.
  - If no response, attempt final confirmation by phone (if applicable).
5. **No-Show Follow-Up**
  - Document no-show in PMS.
  - Initiate follow-up communication to reschedule if needed.

## 6. Documentation

- All confirmations, reminders, and responses are to be documented in the PMS.
- Maintain records of communications per clinic policy for compliance and quality assurance.

## 7. Review & Compliance

- This SOP will be reviewed annually or as needed based on process audit outcomes.
- Non-compliance will be addressed according to clinic policy.

## 8. References

- Practice Management System User Manual
- Internal Communication Policy
- Local regulations on patient communications and privacy

*Version: 1.0 | Effective Date: [Insert Date]*