SOP: Client Appointment Scheduling and Confirmation Procedures

This SOP details the **client appointment scheduling and confirmation procedures**, covering the process of booking appointments, verifying client information, sending confirmation notifications, handling rescheduling or cancellations, and maintaining accurate appointment records. The objective is to ensure efficient communication, reduce no-shows, and enhance client satisfaction by streamlining the appointment management workflow.

1. Purpose

To provide a standardized procedure for scheduling, confirming, rescheduling, and cancelling client appointments, ensuring a consistent and professional client experience.

2. Scope

This SOP applies to all staff responsible for managing client appointments, both in-person and virtual, across all business departments.

3. Responsibilities

- **Reception/Front Office Staff:** Primary management of appointment bookings, confirmations, and record maintenance.
- **Department Managers:** Oversight of compliance with SOP and support with issue resolution as needed.
- **All Staff:** Ensuring accurate communication and timely updation of the appointment system.

4. Procedures

4.1 Booking Appointments

1. Receive client request for appointment via approved channels (phone, email, online portal, walk-in).
2. Check availability in the appointment scheduling system.
3. Verify required client details (full name, contact information, service required).
4. Input appointment details into the scheduling system, including date, time, service, and assigned staff member.
5. Confirm appointment details with the client.

4.2 Verifying Client Information

1. Confirm client's full name and preferred contact method.
2. Verify up-to-date contact information (phone number, email address).
3. Update client profile in the system if any information has changed.

4.3 Sending Confirmation Notifications

1. Send appointment confirmation via the client's preferred method (SMS, email, phone call), immediately after booking.
2. Include all relevant details: date, time, location (if in-person), service, and cancellation/rescheduling policy.
3. Send a reminder notification a pre-set time before the appointment (e.g., 24 hours in advance).

4.4 Rescheduling or Cancelling Appointments

1. Receive rescheduling/cancellation request from the client via approved channels.
2. Verify client's identity for security.
3. If rescheduling: check alternative availability and book new date/time.
4. If cancelling: confirm cancellation and remove the appointment from the system.
5. Send updated confirmation or cancellation notice to the client.
6. Document the change in the appointment records.

4.5 Maintaining Appointment Records

1. Ensure all appointment details, confirmations, changes, and cancellations are accurately logged in the

appointment system.
2. Regularly review records for completeness and accuracy.
3. Report discrepancies or issues to the manager promptly.

5. Documentation

Document	Location	Retention Period
Appointment Records	Appointment Scheduling System	Minimum 1 year
Client Contact Logs	Client Files/CRM	Minimum 1 year
Cancellation/Rescheduling Logs	Appointment Scheduling System	Minimum 1 year

6. Revision and Review

- SOP shall be reviewed annually or when significant process changes occur.
- Feedback from staff and clients should be considered for continuous improvement.
- Revisions must be approved by department management and communicated to all relevant staff.