# SOP: Documentation of Scheduled Appointments in Management System

This SOP details the process for **documentation of scheduled appointments in the management system**, including appointment booking, data entry accuracy, confirmation protocols, rescheduling and cancellation procedures, and secure record-keeping. The purpose is to ensure efficient tracking, management, and retrieval of all scheduled appointments, enhancing organizational workflow and client communication.

## 1. Scope

This procedure applies to all staff responsible for scheduling and managing appointments within the designated management system.

## 2. Responsibilities

- Front-desk staff or assigned personnel are responsible for booking, confirming, updating, and cancelling appointments.
- Supervisors must periodically audit records for accuracy and compliance.

## 3. Procedure

1. **Appointment Booking**
   a. Access the management system using authorized credentials.
   b. Enter the client's full name, contact details, date and time of appointment, and reason for visit.
   c. Select the relevant provider or department, if applicable.
2. **Data Entry Accuracy**
   a. Verify client information before finalizing the booking.
   b. Double-check entry fields for spelling errors, date accuracy, and completeness.
3. **Confirmation Protocols**
   a. Confirm appointment details with the client verbally or via email/SMS.
   b. Record the confirmation method and date/time in the management system.
4. **Rescheduling and Cancellation**
   a. When notified of changes, search for the relevant appointment in the management system.
   b. Update the appointment status to "Rescheduled" or "Cancelled", including reason and requester details.
   c. Contact the client to confirm the change and record confirmation.
5. **Secure Record-keeping**
   a. Ensure all appointment data is saved and backed up according to company protocol.
   b. Maintain confidentiality and restrict access to authorized staff only.

## 4. Documentation

| Record Type | Storage Location | Retention Period |
| --- | --- | --- |
| Appointment Records | Management System Database | As per data retention policy |
| Confirmation Logs | Management System or Email/SMS Archive | As per data retention policy |
| Audit Reports | Internal File Server | 2 years |

## 5. Compliance & Review

- Periodic audits will be conducted to verify adherence to this SOP.
- Updates to this SOP will be communicated and staff will receive refresher training annually or as needed.

## 6. References

- Data Privacy Policy
- Internal Scheduling Guidelines
- IT Security Policy