# PRACTICE OPERATIONS MANUAL

## Appointment Management

powerdiary

# APPOINTMENT MANAGEMENT

*Here's where we describe core expectations for appointment management, including booking appointments, appointment reminders, no-shows and cancellations, rescheduling and emergencies.*

*Review these policies at least annually for any needed updates.*

## BOOKING APPOINTMENTS

### Purpose

The purpose of this policy is to ensure all appointments are booked consistently, with the appropriate clinician, and that clients are booked with the correct number of appointments in an appropriate timespan.

### Definitions

Session Packs are a Power Diary feature used to keep track of the number of sessions, hours or money a client has used.

### Policy

- Administration is primarily responsible for booking management
- Clients may book appointments online using the Power Diary Client Portal
- Where possible, clients should be offered a consistent appointment day, time and frequency (i.e., bi-weekly appointments on Monday at 1pm)
- Clients should be offered to book appointments in advance to ensure consistency in care
- When an Assessment is booked, Administration must also book report writing time to ensure timeliness in report turnarounds
- Existing clients must be booked with their usual clinician
- Appointments must have the active Session Pack applied at time of booking
- Clients should be advised of the session cost and cancellation policy

### Procedure

#### New Client Bookings

When booking appointments for new clients, book [#Number of Appointments] appointments approximately [X] weeks apart. All client profiles maintained in Power Diary must have the following details:

- Full Name
- Phone Number (mobile preferred)
- Date of Birth
- Email Address

Depending on the client type, entering additional insurance, agency coverage or an individual's credit card information may be required.

Upon booking the appointment, email the New Client Welcome Pack via Power Diary.

## Existing Client Bookings

When booking an appointment for an existing client, they should be booked with their usual clinician.

Where possible, clients should be booked into a regular appointment time and day for the term / year / duration of their service agreement / duration of their referral.

## Allocation to Clinician

When booking new clients into the practice, discuss with the client, referrer or caregiver the concerns or diagnosis of the client. Check the referral to ascertain if the client has been referred to a particular clinician. Allocate the client to a clinician based on the client's special interest area.

## Optimal Bookings

Administration must ensure that clinician calendars are as full and as efficiently scheduled as possible. Bookings should be grouped together to ensure no large gaps in a clinician's calendar.

As a guide:

- Administration should aim for [X] hours of client appointments per day, per clinician.
- For in-person appointments, a 10 minute buffer should be allocated between appointments to allow enough time for reset, including cleaning of resources and equipment.
- Clinicians should be allocated a maximum of one new client per day.
- Clinicians should be allocated a maximum of one couples counselling session per day.
- Clinicians should not be allocated more than 3 x 1 hour sessions in a row. A rest/ lunch break must be scheduled after 3 hours, or in accordance with regulations.

# GROUP SESSIONS

## Purpose

The purpose of this policy is to ensure that all group sessions are managed consistently.

## Policy

- Groups must be booked to at least [XX]% capacity to run
- Clients that have paid for a group session series in full must have a Session Pack created and applied to their bookings

## Procedure

### Cancelling Group Sessions

Where a group session needs to be cancelled, Administration must call all enrolled clients and send a follow up email notifying them of the cancelled group session. Wherever possible, provide clients with a minimum of 24 hours notice in advance of a cancelled session.

# APPOINTMENT REMINDERS

## Purpose

The purpose of this policy is to reduce the impact of no-shows and late cancellations, by ensuring that clients receive appointment reminders to confirm attendance.

## Policy

Appointment reminders are sent automatically through Power Diary, via email or SMS, [Insert #] hours prior to each appointment.

## Procedure

To enable the use of Automatic appointment reminders, this setting will need to be configured in Power Diary. Click here for a step-by-step tutorial.

Where a client has not responded to an appointment reminder within 24 hours of the appointment, the client should be called to confirm the appointment.

If the client confirms the appointment via phone, change the appointment status to 'Confirmed' in Power Diary.

If the client cannot be contacted via phone, no further attempts to confirm the appointment need to be made. Leave the appointment status as 'Pending' and make an admin note on the client file regarding attempts to contact the client.

# NO-SHOWS AND CANCELLATIONS

## Purpose

The purpose of this policy is to set a standard approach for managing cancellations to ensure fairness and transparency.

## Definitions

Cancellation is considered an appointment cancelled when notice of cancellation is given in excess of 24 hours prior to the appointment.

Late Cancellation is considered an appointment cancelled when notice of cancellation is given within 24 hours of the scheduled appointment.

No-Show is considered an appointment that has not been cancelled and the client did not show up to the appointment.

## Policy

- Clients must provide 24 hours notice prior to the scheduled appointment if they wish to cancel
- In the event of a late cancellation, cancellation fees must be paid prior to the next scheduled appointment

## Procedure

### Processing Cancellations

When a client cancels an appointment via email or phone more than 24 hours in advance of the appointment time, Administration must update the appointment in Power Diary to ‘Cancelled’, make note of the reason for cancellation and offer to book another appointment.

When a client responds to an automated message to cancel the appointment, Administration must contact the client to acknowledge the cancellation, seek reason for the cancellation and offer to book another appointment.

### Handling Late Cancellations

Where a client requests to cancel their appointment with less than [X] hours notice, advise the clinician and determine whether it is appropriate to offer another service i.e. Telehealth. If the clinician wishes to offer an alternate service, contact the client to advise that their cancellation request has been received, but to avoid the late cancellation fee, the clinician will [Describe Alternate Service]. If the client agrees, amend the appointment booking accordingly. If there is no appropriate alternative or the client declines the alternative service, set the Appointment Status as ‘Late Cancellation’. Administration must seek reason for the late cancellation, advise of the cancellation fee and offer to book another appointment.

It is the Practice Manager / clinician / Business Owner’s discretion to determine whether a late cancellation fee will be charged.

## Handling No-Shows

If the client does not show up for their appointment, Administration must call the client to check on their welfare, advise of the no-show fee and attempt to book another appointment.

## Repeat Cancellations

Where a client’s attendance rate is below 60%, Administration must advise the clinician, who will then make a determination if further appointments can be offered to the client.

# MAKE-UP APPOINTMENTS AND RESCHEDULING

## Purpose

The purpose of this policy is to set a standard approach to the management of make-up appointments and rescheduling.

## Policy

- [Business Name] [Does / Does Not] permit make-up appointments
- Clients who request to reschedule their appointment within 24 hours of the scheduled appointment may be required to pay a cancellation fee, if applicable.

## Procedure

### Rescheduling appointments

Where an appointment is to be rescheduled, change the status of the original appointment to 'Rescheduled' in Power Diary, then book a new appointment on the new date and time.

# EMERGENCY AND PRIORITY CASES

## Purpose

The purpose of this policy is to set a standard approach to managing emergency and priority cases.

## Definitions

Emergency is defined as a case where someone is in crisis / acute pain / acute risk

Priority Case is defined as someone who is at risk of physical / mental decline and requires consistent/ immediate therapy

## Policy

- The Practice Manager / regular clinician will make the decision of whether a client request constitutes an emergency or priority case
- Where possible, Emergency and Priority cases should be offered appointments within 24 hours of the request

## Procedure

### Receiving an Emergency / Priority Appointment Request

Upon receipt of an emergency / priority request, gather the following details:

- Client Name
- Client contact number
- Reason for the appointment

If the client is in crisis, encourage them to call an emergency line or visit their nearest emergency department. If the appointment request is appropriate for the clinician to handle, contact the clinician (or if the client is new, the practice manager or senior clinician) to approve the priority / emergency request.

If the request can be accommodated, contact the client and book the appointment into the calendar.

If the request cannot be accommodated, ask their clinician for alternative services / options for the client, then contact the client and advise that there is no availability for an urgent appointment, but they'll be placed on a cancellation list and advised of the alternate services (where applicable). Offer them the next available appointment and process accordingly.

# WAITLIST MANAGEMENT

## Purpose

The purpose of this policy is to ensure a fair, professional and efficient approach is taken when there is no availability for new clients, and where the appointment preference requests of existing clients cannot be accommodated.

## Policy

- The Power Diary Waitlist must only be used for existing clients seeking earlier appointments
- New clients seeking to access the service when books are closed must be classified as 'Waiting List'

## Procedure

### Existing Clients - Power Diary Waitlist

Existing clients that request to be contacted when an earlier or more preferred appointment opens up must be placed on the Power Diary Waitlist (People > Waitlist). Each client on the Waitlist must have their preferred clinician, relevant notes, preferred location and appointment times noted.

When an appointment becomes available, administration must review the Waitlist and SMS clients whose preferences meet the available spot.

### New Clients - Waiting List to access the service

When the practice's books are closed, new clients must be offered a place on a separate Waiting List. To add a client to the Waiting List, create a new client profile in Power Diary and select their classification status as 'Waiting List'.

Ensure the following details are collected:

- Name
- Date of Birth
- Parent / Guardian Name (if applicable)
- Phone Number
- Email Address
- Reason for appointment

Advise the client that we will contact them each month to advise them of their progress on the Waiting List and to gather any new information they may wish to share with us.

# APPENDIX

## New Client Welcome Pack

SUBJECT: Welcome to [Business Name], {RecipientFirstName}

Dear {RecipientFirstName},

Thanks for choosing [Business Name], we've included some details about your upcoming appointment below.

### Date and Time

Your appointment has been booked at {AppointmentStartTime} on {AppointmentDate}. We will send a reminder SMS and email 2 days before your appointment, please reply Yes to confirm the appointment.

### Location

We are located XX.

### Fees and Payment

Each session is $XXX.XX. We have secure credit card processing facilities to take payment on the day of your appointment.

### Cancellation Policy

We understand that plans may change. If you do need to reschedule your appointment, we ask for 48 hours notice. If 48 hours notice is not given, a cancellation fee equal to the cost of the session may apply.

### Before Your Appointment

So that we make best use of your first appointment, please take a moment to complete the below forms.

> Registration Form

> Consent Form

If you have any questions regarding your appointment, do not hesitate to call us on XXXXXXXXXX, or email us at [Business Email Address]. We look forward to meeting you.

<<insert name>>

<<insert clinic signature>>