

# Dental Appointment Scheduling SOP

|                |                    |
|----------------|--------------------|
| Document no.   | SOP-DEN-006        |
| Revision       | 1.0                |
| Owner          | Office Manager     |
| Effective date | September 15, 2026 |
| Review cycle   | Every 12 months    |

## 1. Purpose

To fill the schedule efficiently, reduce missed appointments through timely confirmations, and bring patients back for recall visits on time.

## 2. Scope

Applies to scheduling of routine and recall dental appointments through the practice management system. Emergency same-day scheduling is covered by a separate procedure.

### Definitions

|                              |                                                                                                               |
|------------------------------|---------------------------------------------------------------------------------------------------------------|
| Recall appointment           | A routine preventive visit, such as a cleaning and exam, scheduled at an interval recommended by the dentist. |
| Confirmation call or message | Contact made with the patient before the appointment to confirm they still plan to attend.                    |
| Same-day cancellation        | A cancellation made too close to the appointment time to reasonably fill the slot from a waiting list.        |

## 3. Responsibilities

|                        |                                                                                                |
|------------------------|------------------------------------------------------------------------------------------------|
| Front Desk Coordinator | Books, confirms and reschedules appointments, and manages the daily schedule and waiting list. |
| Office Manager         | Oversees the recall system, monitors schedule fill rate and resolves repeated no-shows.        |
| Dentist                | Sets recall intervals and treatment time requirements used to build the schedule template.     |

### RACI matrix

| Activity                                  | Front Desk Coordinator | Office Manager | Dentist |
|-------------------------------------------|------------------------|----------------|---------|
| Book a new or follow-up appointment       | R/A                    | I              | C       |
| Send appointment confirmations            | R/A                    | I              | -       |
| Manage cancellations and the waiting list | R/A                    | C              | -       |
| Run the recall program                    | R                      | R/A            | C       |

R = Responsible, A = Accountable, C = Consulted, I = Informed

## 4. Materials and PPE

### Materials, tools and systems

- Practice management system with scheduling module
- Recall interval guidelines by treatment type
- Confirmation call script or automated messaging system
- Waiting list for short-notice openings
- No-show and cancellation tracking log

## 5. Procedure

| Step | Task                                                                                                                                                                                                                                                                                                                                     | Owner                  | Done                     |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|--------------------------|
| 5.1  | <b>Determine the appointment type and time needed</b><br>Identify the procedure being scheduled and the chair time it requires using the practice's standard time blocks for that treatment type.                                                                                                                                        | Front Desk Coordinator | <input type="checkbox"/> |
| 5.2  | <b>Check provider and operatory availability</b><br>Check the schedule for an open slot with the correct provider and operatory type, considering any equipment needed for the procedure.                                                                                                                                                | Front Desk Coordinator | <input type="checkbox"/> |
| 5.3  | <b>Book the appointment</b><br>Enter the appointment in the practice management system with the patient's contact information, procedure code and any special notes for the clinical team.<br><b>Checkpoint:</b> The booked time block matches the standard duration for the procedure type before the slot is confirmed to the patient. | Front Desk Coordinator | <input type="checkbox"/> |
| 5.4  | <b>Communicate preparation instructions</b><br>Tell the patient about any preparation needed for the visit, such as arrival time for paperwork or fasting instructions for sedation, at the time of booking.                                                                                                                             | Front Desk Coordinator | <input type="checkbox"/> |
| 5.5  | <b>Send an appointment confirmation</b><br>Send a confirmation message or call the patient within the practice's standard window before the appointment, and note the response in the system.                                                                                                                                            | Front Desk Coordinator | <input type="checkbox"/> |
| 5.6  | <b>Follow up on unconfirmed appointments</b><br>For patients who have not responded to the confirmation attempt, follow up again before the day of the appointment, and flag the appointment as at risk if still unconfirmed.                                                                                                            | Front Desk Coordinator | <input type="checkbox"/> |
| 5.7  | <b>Manage a cancellation or reschedule request</b><br>When a patient cancels or asks to reschedule, offer the next available appointment and note the reason for the change in the system.                                                                                                                                               | Front Desk Coordinator | <input type="checkbox"/> |
| 5.8  | <b>Fill the opening from the waiting list</b><br>For a cancellation with enough notice, offer the opening to a patient on the waiting list; for a same-day cancellation, try to fill it or adjust the day's schedule.                                                                                                                    | Front Desk Coordinator | <input type="checkbox"/> |
| 5.9  | <b>Track repeated no-shows</b><br>Log each no-show or late cancellation on the patient's account, and flag patients with a pattern of missed appointments to the office manager.                                                                                                                                                         | Front Desk Coordinator | <input type="checkbox"/> |

| Step | Task                                                                                                                                                                                                      | Owner                  | Done                     |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|--------------------------|
| 5.10 | <b>Address a pattern of missed appointments</b><br>Contact patients with repeated no-shows to discuss a scheduling approach that works better for them, applying the practice's no-show policy as needed. | Office Manager         | <input type="checkbox"/> |
| 5.11 | <b>Run the recall report</b><br>Run the recall report on the practice's schedule to identify patients due or overdue for their next preventive visit based on the dentist's recommended interval.         | Office Manager         | <input type="checkbox"/> |
| 5.12 | <b>Contact patients due for recall</b><br>Reach out to patients identified in the recall report to schedule their next visit, prioritizing those who are significantly overdue.                           | Front Desk Coordinator | <input type="checkbox"/> |

## 6. Quality checks

- Confirmation attempts are made within the standard window for every scheduled appointment.
- No-shows and cancellations are logged consistently on the patient's account.
- The recall report is run and worked on the practice's set schedule.
- Booked time blocks match the standard duration for the procedure type.

## 7. Records

- Appointment schedule in the practice management system
- Confirmation call and message log
- No-show and cancellation tracking log
- Recall report and outreach results

## 8. KPIs

- Schedule fill rate
- No-show and late cancellation rate
- Percentage of appointments confirmed before visit
- Recall patients scheduled versus overdue

## 9. Common mistakes

- Booking a procedure into a time block that's too short for the treatment.
- Skipping the second confirmation attempt for an unresponsive patient.
- Letting the recall report go unworked for more than the practice's set schedule.
- Not logging a no-show, which hides a pattern that needs to be addressed.

## 10. Revision history

| Revision | Date               | Description     | Reviewed by     |
|----------|--------------------|-----------------|-----------------|
| 1.0      | September 15, 2026 | Initial release | Ilia Pirozhenko |

## Approval

| Prepared by | Approved by | Date |
|-------------|-------------|------|
|-------------|-------------|------|

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