STANDARD OPERATING PROCEDURE

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	**Determine the appointment type and time needed** 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	☐
5.2	**Check provider and operatory availability** Check the schedule for an open slot with the correct provider and operatory type, considering any equipment needed for the procedure.	Front Desk Coordinator	☐
5.3	**Book the appointment** Enter the appointment in the practice management system with the patient's contact information, procedure code and any special notes for the clinical team. **Checkpoint:** The booked time block matches the standard duration for the procedure type before the slot is confirmed to the patient.	Front Desk Coordinator	☐
5.4	**Communicate preparation instructions** 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	☐
5.5	**Send an appointment confirmation** 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	☐
5.6	**Follow up on unconfirmed appointments** 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	☐
5.7	**Manage a cancellation or reschedule request** 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	☐
5.8	**Fill the opening from the waiting list** 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	☐
5.9	**Track repeated no-shows** 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	☐

Step	Task	Owner	Done
5.10	**Address a pattern of missed appointments** 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	☐
5.11	**Run the recall report** 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	☐
5.12	**Contact patients due for recall** Reach out to patients identified in the recall report to schedule their next visit, prioritizing those who are significantly overdue.	Front Desk Coordinator	☐

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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