

### Overview

This standard is about administering patient appointments. Referral may be from GP's, consultants, patients, A&E, carers and external agencies. You will need to be able to receive and record information for appointments. Based on this information you will then need to schedule patient appointments and communicate appointments to patients and others. Communication may be by letter, telephone, face to face, electronic means (e.g. e-mail) or fax. It is unlikely you would use all of these methods, but you do need to have a good awareness of them all.

The standard also covers receiving patients and reconciling clinics. You will need to communicate with patients effectively and check their details. Because of the sensitivities involved you will need to maintain the patients' dignity and confidentiality. You will also need to record the outcome of appointments. The outcome may be for example; follow up appointment, patient discharge, add to waiting list or admission. For this standard you will need a good awareness of health records administration and the importance of data quality.

Users of this standard will need to ensure that practice reflects up to date information and policies.

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### Performance criteria

*You must be able to:*

- P1 obtain the required information for appointments
- P2 check the information against the master patient index and take the appropriate action
- P3 record the necessary referral information
- P4 pass the referral to the health care professional for prioritising within the required timescale
- P5 maintain the confidentiality of information at all times
- P6 allocate appointments by applying protocols and booking rules
- P7 book appointments or put the patient on the appropriate list
- P8 communicate the status of appointments to patient and others
- P9 monitor appointments availability and ensure effective use of appointments to meet local and national priorities
- P10 reschedule and reallocate appointments and communicate new information to patient and others
- P11 prepare for clinic and ensure all health records are available
- P12 take the appropriate action if records are missing
- P13 communicate effectively with patients and others
- P14 receive and correctly identify patients at reception
- P15 deal with patients sensitively and handle any difficulties that they may have with procedures with care and respect
- P16 check the patients current demographic information against the master index and where necessary update the information
- P17 record patients arrival and pass the health records through to clinic
- P18 where necessary, record the administrative outcome of appointments
- P19 reconcile the clinic list by balancing attendance against scheduled appointments
- P20 process health records correctly in accordance with the appointment outcome

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### Knowledge and understanding

*You need to know and understand:*

- K1 current legislation, policies, guidelines and codes of practice in relation to administering patient appointments
- K2 organisational procedures and protocols for administering appointments
- K3 the importance and reasons for maintaining confidentiality
- K4 the importance and reasons for validating and entering timely, accurate and relevant data
- K5 information required for appointments
- K6 the purpose of the master patient index
- K7 how to use the master patient index
- K8 the booking rules in your organisation
- K9 how to allocate appointments
- K10 the different types of appointments
- K11 how to ensure appointments are suitable for the patient
- K12 how and when to communicate appointments to patients
- K13 how to liaise with other staff to make appointments
- K14 how to manage the pending appointments
- K15 how to manage duplicate records
- K16 the function and use of the minimum data set
- K17 health record tracking procedures
- K18 the importance of maintaining the dignity of the patient and treating them with respect
- K19 how to communicate effectively with patients and others
- K20 how to deal with difficult situations that may arise
- K21 the requirements of clinics in terms of health records and patient appointments
- K22 the health records procedures for patients attending clinics
- K23 the action to take if health records are missing
- K24 the administrative outcomes of appointments
- K25 how to reconcile clinic lists

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### Additional Information

#### External Links

This standard links with the following dimension within the NHS Knowledge and Skills Framework (October 2004):

Dimension: G5 Services and Project Management

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**Relevant occupations** Health, Public Services and Care; Health and Social Care; Managers and Senior Officials; Associate Professionals and Technical Occupations; Health and Social Services Officers; Health Associate Professionals; Personal Service Occupations; Healthcare and Related Personal Services

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**Suite** Support Services

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**Key words** Portering, Cleaning, Housekeeping, Laundry, Health Records, Mail, Security

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