



Clinic Appointment Book & Appointment Card Templates

How to Use the Clinic Appointment Book Template

Appointment systems are an important part of quality ANC, PMTCT, ART, and under-5 services. An appointment book is an important foundation for a functioning appointment system. Appointment books can help clinic staff manage client flow, plan for each day, and identify clients who have missed appointments so they can be followed up, according to the facility protocol, and brought back into care. Each clinic (e.g. ANC, ART, under-5, etc.) should have its own appointment book. **It is best if one person at each clinic is designated as responsible for making and keeping track of daily appointments and follow-up to make sure that no one is missed.**

Making an Appointment Book:

- Use the template on the following pages as a guide to create an appointment book.
- Decide on the needed columns in the appointment book. At minimum, the appointment book should include spaces to write: the client's name, the client's unique clinic number, the client's contact information, the reason for the appointment, whether or not the client attended the appointment, actions taken to follow up on a missed appointment, the outcome of follow-up attempts, and comments. Clinic teams should decide which column headings and response choices are most appropriate for their clinical setting.
- Decide the date range for the appointment book. The appointment book should cover at least one full year from the current date (but can cover more). You should "X" national holidays, weekends, and other days the clinic will be closed in the yearly calendar and on the daily calendar pages to avoid scheduling appointments on these days.
- Decide how many appointment slots and pages the clinic will need for each day. Each working day should have at least one full page in the appointment book, and maybe more, depending on how many clients are seen at the clinic on an average day. For example, a clinic that sees an average of 30 or fewer clients per day will likely only need 1 page allocated for each working calendar day; a clinic that sees between 30-60 clients per day will need 2 pages for each working day; and a clinic that sees more than 60 clients per day will need 3 (or more) pages for each working day.
- Once all the necessary pages of the appointment book have been printed, spiral bind the appointment book with a thick, hard, and/or plastic cover to prevent wear and damage.
- Create a Standard Operating Procedure (SOP) on the clinic appointment system, including how the appointment book will be used. The SOP should be detailed and specific to the clinical setting. Include who will be responsible for scheduling and following up on appointments, where the appointment book will be housed, how the appointment book will be used, and how missed appointments will be followed up.
- Train all of the clinic staff on the rationale for, and use of, the appointment book.

Daily Activities (*adapt these activities to the specific clinical setting and outline in detail in the SOP*)

Making appointments:

- Before each client leaves the clinic, she or he should schedule a follow-up appointment.
- Use the yearly calendar at the start of the appointment book to determine which day the person should return (for example, in 6 months for a CD4 test and follow-up, in 2 months for a routine ANC visit, in 1 week for lab results, in 3 days for an adherence counseling session, or in 2 weeks for a follow-up appointment with the doctor).
- Find the daily appointment sheet for the return date. Each day, Monday-Friday, has its own page (front and back).
- When you find the correct daily appointment sheet, and confirm that this date is convenient for the client, write the Client's Name, Client Number (ANC or ART number on file), and the Phone Number where the person can be reached.
- Using the codes given, write the Reason for Visit (FU=Routine Follow-up, HP = Health Problem, C=Counseling, Rx=Refill, LT=Lab Test, LR=Lab Results, or O=Other [list]).
- Make sure to tell the client when to return to the clinic and why she or he needs to return. Write the appointment date on the small take-away reminder slip (this can be stapled to any existing client-held health card).
- Give the client instructions on what to do if she or he will not be able to come back to the clinic on the date of the appointment (for example, if there is a phone at the clinic, make sure the client has this number so she can call and reschedule the appointment if necessary).

Keeping track of daily clinic attendance:

- Each morning, pull the client files for all of the people with an appointment, and put them in a convenient location.
- Each morning, draw a thick line on the daily appointment sheet under the last person with a scheduled appointment.
- When a client arrives at the clinic, check to see if she or he is scheduled for an appointment that day.
- If you see the name on the daily appointment sheet, tick Yes under the column that says Attended?
- If you do not see the name, **DO NOT SEND THE CLIENT AWAY!** Record the name under the line on the daily appointment sheet and fill in the client's information as above. Every day, it is important to record each person who comes to the clinic, whether or not they have an appointment. Make sure the client understands why it is important to have an appointment.
- Try to prioritize clients who have scheduled appointments to decrease their waiting time and reinforce the importance of making and keeping appointments.
- At the end of each day, go through each entry above the line you drew on the daily appointment sheet. For each person that had a scheduled appointment for that day (above the line you drew), make sure Yes or No is ticked in the Attended? column.
- Then, in the Total row at the bottom of the last page for that day, enter how many people attended the clinic for scheduled appointments and how many did not show up for their scheduled appointments.

Weekly Activities (*adapt these activities to the specific clinical setting and outline in detail in the SOP*)

- Every Monday morning, review the daily attendance of the previous week (5 working days).
- It is important to give a couple of days leeway for clients who miss appointments, before conducting follow-up. Clients may come to the clinic during the couple of days following their scheduled appointment.
- Implement the standard clinic protocol for following up with clients who miss appointments each week (this will depend on the site). Clients need to give specific consent to get a phone call, SMS, or home visit. This should be noted on their individual client record.
- For each person who missed an appointment in the previous week, tick the appropriate Action Taken. This could be more than one action and could include sending an SMS, calling the person, conducting a home visit, or linking with a community health worker to conduct a home visit. Remember, this should only be done if the client has given consent.
- Record the Outcome of follow-up activities. If the client comes back to the clinic within two weeks of the missed appointment, tick Came back. If the client does not return, tick Did not come back.
- Write any Comments about attempts to contact specific clients or the outcomes of these contacts. For example, record when a client has died, moved away, transferred to another health facility, or other information. You can also record when you were unable to reach the person or if there is a wrong phone number on file.

Monthly or Quarterly Activities (*adapt these activities to the specific clinical setting and outline in detail in the SOP*)

- Each month, the person responsible should review the previous month's appointments and ensure that follow-up has been conducted with all clients who missed appointments during that month, and that the type of follow-up attempt(s) and outcomes have been documented in the appropriate columns.
- In some cases, clients may require multiple follow-up attempts, which should be recorded.
- Monthly and quarterly totals of the number of attended and missed appointments, as well as the number of follow-up attempts and results of these attempts, should be calculated.
- These data can be presented for discussion at multidisciplinary team meetings, and used to track trends in attended and missed appointments over time. Program strategies for follow-up can be discussed and modified based on trends in follow-up success or failure over time. These data can also be used to advocate for more human and financial resources to ensure adequate and timely follow-up of clients who have missed appointments.
- Data and trends in attended and missed appointments, as well as follow-up, should be discussed with local partners, including community-based organizations and community health workers who are responsible for home-based follow-up and encouraging clients who have missed appointments to return to care.

Date: _____

	CLIENT NAME	CLIENT NUMBER (ANC or ART)	PHONE NUMBER	REASON FOR VISIT*	ATTENDED ?		IF NO, ACTIONS TAKEN			OUTCOME		COMMENTS (client refused to return, died, moved, transferred, no contact information, etc.)
					YES	NO	Call	SMS	Visit	Came back	Did not comeback	
1												
2												
3												
4												
5												
6												
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9												
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TOTALS (from all pages)												

*REASONS FOR VISIT: FU=Routine Follow-up • HP=Health Problem • C=Counseling • Rx=Refill • LT=Lab Test • LR=Lab Results • O=Other (explain)

Date: _____

	CLIENT NAME	CLIENT NUMBER (ANC or ART)	PHONE NUMBER	REASON FOR VISIT*	ATTENDED ?		IF NO, ACTIONS TAKEN			OUTCOME		COMMENTS (client refused to return, died, moved, transferred, no contact information, etc.)
					YES	NO	Call	SMS	Visit	Came back	Did not comeback	
26												
27												
28												
29												
30												
31												
32												
33												
34												
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TOTALS (from all pages)												

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How to Use the Appointment Card Template

Appointment systems are an important part of quality ANC, PMTCT, ART, and under-5 services. Appointment reminder cards for clients are an important component of functioning appointment systems, along with appointment books and active and timely follow-up of missed appointments. Appointment reminder cards can help clients remember their return appointment dates and the reasons for their appointments.

- **Adapt the appointment reminder card template below**, according to the clinic's and the client's specific needs, including translating the card into local languages, as needed.
- **Prepare many, blank copies of the appointment cards** to have readily available at the clinic.
- **Each client should have an appointment reminder card.** In some cases, it may be useful to staple the appointment card onto existing client-held records or booklets.
- **When an appointment is made, the person responsible for appointments should clearly write the appointment date** in the 1st column and briefly describe the reason for the appointment in the 2nd column. Always use language that is understandable to the client – for example, write “Refill” instead of “Rx” or “Lab test” instead of “LFT.”
- **Be sure to discuss the appointment date and reason** with the client to ensure that it is on a convenient date and that the client understands the importance of returning to the clinic for all scheduled appointments. Ask the client if there are other appointments that she, he, or the baby has at the clinic in order to organize both visits on the same day (for example, an infant EPI visit).
- **Encourage the client to inform the clinic**, for example by calling, if she or he will not be able to make the scheduled appointment.
- **When the client returns for her or his appointment on the correct day, place a tick (✓) in the 3rd column.** Thank the client for being responsible and coming in on the appointment day.
- **This template has space to include 10 separate appointments**—use more cards for each client as necessary.

CLINIC APPOINTMENTS		
Client's Name: _____ Health Facility: _____		
APPOINTMENT DATE	REASON	ATTENDED (✓)
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

PLEASE COME TO ALL OF YOUR APPOINTMENTS!

If you cannot come, please call: _____