
Overview

This standard is about administering appointments. You will need to be able to receive and record information for appointments. Based on this information you will then need to schedule appointments and communicate appointments to others. This standard also covers receiving individuals for appointments. You will need to communicate with individuals effectively and check their details. Because of the sensitivities involved you will need to maintain their dignity and confidentiality. You will also need to record the outcome of appointments. The outcome may be for example: follow up appointment, discharge, add to waiting list or admission. For this standard you will need a good awareness of records administration and the importance of data quality. You will also need to adhere to organisational protocols and procedures.

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

SFHGEN25 - SQA Code HD2T 04

Administer appointments

Performance criteria

You must be able to:

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

SFHGEN25 - SQA Code HD2T 04

Administer appointments

Knowledge and understanding

You need to know and understand:

- K1 current legislation, policies, guidelines and codes of practice in relation to administering 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 how to maintain up to date information for appointments
- K7 the booking rules in your organisation
- K8 how to allocate appointments
- K9 the different types of appointments
- K10 how to ensure appointments are suitable for the individual
- K11 how and when to communicate appointments to individuals
- K12 how to liaise with other staff to make appointments
- K13 how to manage the pending appointments
- K14 how to manage duplicate records
- K15 the function and use of the minimum data set
- K16 the importance of maintaining the dignity of the individual and treating them with respect
- K17 how to communicate effectively with individuals and others
- K18 how to deal with difficult situations that may arise
- K19 the records procedures for individuals with appointments
- K20 the action to take if records are missing
- K21 the administrative outcomes of appointments
- K22 how to reconcile appointment lists

SFHGEN25 - SQA Code HD2T 04

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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: General G5 Services and project management

The candidate and assessor must only sign below when all Performance Criteria and Knowledge points have been met.

Unit assessed as being complete

Candidate's Name:	
Candidate's Signature:	
Date submitted to assessor as complete:	

Assessor's Name:	
Assessor's Signature:	
Date assessed as complete:	

Internal Verification —

to be completed in accordance with centre's IV strategy

Evidence for this Unit was sampled on the following date/s:	IV's Signature	IV's Name

This Unit has been subject to an admin check in keeping with the centre's IV strategy.

Date of admin check	IV's Signature	IV's Name

Unit completion confirmed

IV's Name:	
IV's Signature:	
Date complete:	