

## Client Flow and Appointment System Checklist

Health Facility Name: \_\_\_\_\_ Supervisor name: \_\_\_\_\_

Date: / /

Mg 23	The following items represent standards of good reporting and recording practices	Observations
1.	<b>Waiting time:</b> clients are not complaining about waiting in queue for long times to receive the services.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> NA
2.	<b>Absenteeism:</b> the clinic uses absenteeism/attendance register. Workload is redistributed in case of absenteeism.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> NA
3.	<b>Workload distribution:</b> efforts are made to distribute the workload evenly during the day. Also efforts are made to spread the workload over the entire week and among staff themselves.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> NA
4.	<b>Availability of appointment system:</b> there is an appointment system in place. Staff is using the system and clients are complying with it most of the time.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> NA
5.	<b>Appointment calendar:</b> all appointments given to clients are recorded on the appointment calendar.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> NA
6.	<b>Calendar update:</b> The calendar reflects new appointments. Moreover, old appointments are checked off.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> NA
7.	<b>Client follow up card:</b> the date and time of the next visit is recorded in the client card after being updated in the appointment calendar.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> NA
8.	<b>Flexibility:</b> clients are given some flexibility in choosing the time for the visit. The average waiting time is adequate, clients are not required to wait for long times.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> NA
9.	<b>Client contact:</b> the name of the clients with his/her contact information is captured in the appointment calendar.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> NA
10.	<b>Follow up:</b> defaulters are followed up and rescheduled. The reasons for not coming are used to evaluate the effectiveness of the system.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> NA

Please document the key observations on practices in the supervisory report form with in depth analysis whenever needed and suggestions for solutions and next steps. Copyright JSI Training and Research Institute 2008.