




SCH SOP 8.001 – CCI Alternate Visits

Document Controls

Version: 4
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Version History

Version	Effective Date	Description
1	April 30, 2015	Adapted SOP from the Scheduler and Coordinator SOP.
2	November 10, 2015	Changed the Title
3	September 2, 2016	Content and format updated based on the review of the CCI Operations Manager.
4	July 21, 2017	Updated Links embedded in SOP



Purpose

The purpose of this SOP is to describe how the scheduler completes alternate visits (e.g., training, tours, overnight, and maintenance) in the Harvard Catalyst Scheduling System.

Scope

This SOP applies to the Scheduler and Coordinator responsible for creating appointments for subjects at the Center for Clinical Investigation (CCI).

Responsible Personnel

Coordinator – Responsible for requesting an alternate visit

Scheduler – Responsible for scheduling alternate visits

References

1. SCH SOP 8.024 – Processing Overbook Requests

Definitions

Alternate Visit – A visit without a subject for the purpose of tours, maintenance, or other special considerations/situations

Equipment & Materials

1. Harvard Catalyst Scheduling System
<https://hccrc-bwh.partners.org/scheduler/>
2. Scheduling Support Request website
http://cci-webservices.dipr.partners.org/Scheduling_Support/Scheduling_Support.html

Standard Operating Procedure

1. **Requesting an alternate visit**
 - a. Coordinators will submit this request to the CCI Scheduler via the webpage link
 - i. Scheduling Support Request website: http://cci-webservices.dipr.partners.org/Scheduling_Support/Scheduling_Support.html
 - b. Coordinators should use the instructions below to complete the request.
 - i. Select alternate visit from the dropdown menu.
 - ii. Fill out the appropriate form.



- iii. Submit request.
- iv. Await confirmation email or other communication from the CCI scheduler within 24 hours.

2. Scheduling an alternate visit

- a. The scheduler upon receiving an alternate request proceeds to the Harvard Catalyst Scheduling System via <https://hccrc-bwh.partners.org/scheduler/>
- b. To create the appointment
 - i. Go to the Appointments tab.
 - ii. Schedule new appointment.
 - iii. Select a study
 1. Search BWH-001
 2. Select and click "Next"
 - iv. Select a visit; (CCI tours and room maintenance, training visit, mock, etc.) and click "Next"
 - v. Select the box indicating "Hold the appointment without subject"
 - vi. Click "Next"
 - vii. Click "Overbook"
 - viii. Enter the Alternate Visit parameters as defined in the overbook e-mail.
 1. Override Reason: "... Approved by other Resource Manager"
 2. Select Available Room
 3. Enter start date and time
 - a. Note that if the template default time frame is shorter than requested, you will have to alter the time. See below.
 - ix. Click "Next" and the "Reserve Visit"
- c. The CCI scheduler will notify appropriate staff of the visit.
- d. To adjust the time of the alternate visit (either to lengthen or shorten)
 - i. Click the "Appointments" Tab on the home page
 - ii. Click on the specific visit that needs to be adjusted
 - iii. Click on the "Edit" link that corresponds to the resource that needs adjusting
 - iv. Enter in the new start and end times
 - v. Override Reason: "... Approved by other Resource Manager"
 - vi. Click "Save"

Special Notes

N/A

Allowable Exceptions

N/A



Attachments

N/A