



## SCH SOP 8.003 – Scheduling Changes for Room, Time, or Subjects

### Document Controls

**Version:** 4  
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**Approval Date:** 03/06/2019  
**Effective Date:** 03/06/2019

### Version History

Version	Effective Date	Description
1	April 30 2015	Adapted SOP from Room, Time, and Subject Changes SOPs.
2	July 26, 2016	Content and format updated based on the review of the CCI Operations Manager.
3	August 29 2018	Added following sentence under time change section: Check the resource timeline to ensure room is still available for the desired time change. If same room is not available then in the comment section, add "available room" in the resource timeline.
4	February 19, 2019	Updated the SOP to differentiate between visits that a coordinator is unable to modify or if the visit is within 24hour and visits that could be modified by coordinator.



## Purpose

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The purpose of this SOP is to outline the steps of how to change the room, time, or subject for scheduled study visits in the Harvard Catalyst Scheduling system.

## Scope

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This SOP applies to study coordinators that are utilizing the Center for Clinical Investigation (CCI) for ongoing studies.

## Responsible Personnel

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**Coordinator** – Responsible for completing and submitting an overbook request when the room, time, or subject changes on an existing appointment/visit

**Scheduler** – Responsible for verifying that the request is able to be made, booking the visit, and confirming with the coordinator

## References

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1. SCH SOP 8.024 – Processing Overbook Requests

## Definitions

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**Overbook** – A request for the change of a room, time, or subject within 24 hours of an existing appointment/visit

## Equipment & Materials

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N/A

## Standard Operating Procedure

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1. **Room Change**
  - a. If a Research Coordinator would like to change the suite or room of the appointment for any visits that are not within 24 hours, the coordinator can do so via The Harvard Catalyst Scheduling System.
  - b. If Coordinator is unable to change room or suite of the appointment or if the room change request is within the 24 hour period (overbook) prior to the appointment, then the coordinator should submit the online form titled "Room Change" which can be



found here:

[http://cciwebservices.dipr.partners.org/Scheduling\\_Support/Scheduling\\_Support.html](http://cciwebservices.dipr.partners.org/Scheduling_Support/Scheduling_Support.html)

- c. The coordinator will be responsible for contacting the unit and resource managers.

### 2. Time Change

- a. If a Research Coordinator would like to change the time of the appointment for any visits that are not within 24 hours to the originally scheduled time, then the coordinator can do so via The Harvard Catalyst Scheduling System.
  - i. If there is no availability for the desired time change or if the desired visit is within 24 hours (overbook) then the coordinator should submit an online form titled "Time Change" which can be found here: [http://cci-webservices.dipr.partners.org/Scheduling\\_Support/Scheduling\\_Support.html](http://cci-webservices.dipr.partners.org/Scheduling_Support/Scheduling_Support.html)
  - ii. The coordinator can check the resource timeline to ensure a room is still available for the desired time change. If the same room is not available, then in the comment section, the coordinator should add "available room" in the resource timeline and submit the online form titled "Time Change".

### 3. Subject Change

- a. If the coordinator would like to keep the time and date of the scheduled appointment the same but wants to change the subject of the appointment (which is not within 24 hours to the originally scheduled time), the coordinator can do so via The Harvard Catalyst Scheduling System.
- b. If the appointment is within 24 hours and you wish to change the subject then please submit the online form titled "Subject Name Change" which can be found here: [http://cci-webservices.dipr.partners.org/Scheduling\\_Support/Scheduling\\_Support.html](http://cci-webservices.dipr.partners.org/Scheduling_Support/Scheduling_Support.html)

## Special Notes

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1. Note that any overbooks pertaining to Outpatient RN/NP/PA (nursing) resources should be forwarded to the nursing team's e-mail for approval before the scheduler confirms or denies the request.
  - a. [bwhcciadvancedoutptservices@partners.org](mailto:bwhcciadvancedoutptservices@partners.org)

## Allowable Exceptions

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N/A

## Attachments

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N/A