

SOP: Documentation and Reporting Procedures for Calendar Changes

This SOP details the **documentation and reporting procedures for calendar changes**, ensuring all modifications to schedules are accurately recorded, communicated, and tracked. It covers the process for submitting change requests, approval workflows, updating calendar entries, notifying relevant stakeholders, maintaining logs for auditing purposes, and handling any conflicts or discrepancies arising from calendar adjustments. The purpose is to maintain clear, consistent, and transparent scheduling records to support effective time management and coordination across teams.

1. Scope

This procedure applies to all team members involved in requesting, approving, managing, and auditing changes to shared calendars and schedules.

2. Responsibilities

- **Requestor:** Initiates and documents change requests.
- **Approver:** Reviews and approves or denies change requests.
- **Calendar Administrator:** Updates calendar entries and maintains change logs.
- **All Stakeholders:** Are notified of approved changes and are responsible for reviewing impacts on their schedules.

3. Procedure

1. **Submitting Change Requests**
 - Complete a Calendar Change Request Form including date, time, description, and reason for the change.
 - Submit the form via designated platform (e.g., email, ticketing system).
2. **Approval Workflow**
 - The request is reviewed by the assigned Approver within 2 business days.
 - Approver approves or denies the request, providing justification if denied.
3. **Updating Calendar Entries**
 - Upon approval, the Calendar Administrator updates the official calendar with the new information.
 - Any conflicts are flagged and addressed according to the conflict resolution process.
4. **Notification to Stakeholders**
 - All affected parties are notified of the change via email or calendar notification.
 - Notification includes summary of the change and its effective date.
5. **Maintaining Logs**
 - Each change is recorded in a centralized Calendar Change Log for audit purposes.
 - Logs include: date of request, nature of change, requestor, approver, and date of implementation.
6. **Conflict and Discrepancy Handling**
 - Conflicts are escalated to the Calendar Administrator for resolution in consultation with stakeholders.
 - Discrepancies found in audit are corrected, and corrective actions are documented.

4. Recordkeeping & Audit

All change requests, approvals, changes, and communications are retained for a minimum of one year and made available during periodic audits.

Record Type	Owner	Retention Period
Calendar Change Request Forms	Calendar Administrator	1 year
Change Approvals/Denials	Approver	1 year
Calendar Change Log	Calendar Administrator	1 year
Stakeholder Notifications	Calendar Administrator	1 year

5. Review and Update

This SOP is reviewed annually or as required due to process changes or audit findings. All updates are to be documented with version control.

6. Appendices

Sample Calendar Change Request Form

Field	Description
Requestor Name	Name of person requesting the change
Date/Time of Change	Proposed new date and/or time
Current Schedule Details	Details of existing calendar entry
Description and Reason	Summary and justification for change
Approver	Name of person authorizing the change
Status	Pending/Approved/Denied