

# SOP Template: Change Management Process and Documentation

This SOP defines the **Change Management Process and Documentation**, detailing the systematic approach for requesting, reviewing, approving, implementing, and documenting changes within an organization. The process ensures that all changes are controlled and communicated effectively to minimize risk, maintain system integrity, and support business continuity.

## 1. Purpose

To establish a standardized process for managing changes to systems, infrastructure, processes, or documentation, ensuring that changes are efficiently and effectively implemented with minimum risk to business operations.

## 2. Scope

This SOP applies to all personnel involved in the initiation, assessment, approval, implementation, and documentation of changes within the organization's environment (including IT systems, infrastructure, software, and processes).

## 3. Definitions

- **Change:** Any modification, addition, or removal affecting systems, processes, or documentation.
- **Change Request (CR):** A formal proposal for a change.
- **Change Advisory Board (CAB):** A group responsible for reviewing and approving/rejecting changes.
- **Emergency Change:** A change that must be implemented urgently due to an incident or critical need.

## 4. Roles and Responsibilities

Role	Responsibility
Change Requester	Initiate the change request and provide detailed information.
Change Manager	Oversee the change management process, coordinate assessments and approvals, and maintain documentation.
Change Advisory Board (CAB)	Review, approve, or reject change requests; advise on risk and impact.
Implementer	Carry out the approved change as specified in the implementation plan.
IT/Process Owner	Evaluate and assess risk and impact of requested changes to their area.

## 5. Change Management Process

1. **Request Initiation**
  - Submit a Change Request (CR) via the designated system or form, including description, rationale, urgency, impact, and risk assessment.
2. **Review and Assessment**
  - Change Manager reviews CR for completeness.
  - Relevant stakeholders and IT/process owners assess impact and risks.
3. **Approval**
  - CAB reviews the CR, discusses potential risks, and determines approval status (approve, reject, request more information).
  - Emergency changes may follow an expedited approval path.
4. **Implementation**
  - Implementer executes the change as per plan.
  - Monitor for issues during and after the change.
5. **Documentation and Closure**
  - Update relevant documentation (system records, process docs, user guides).
  - Record outcomes and lessons learned.
  - Change Manager closes the request after verifying success and documentation.
6. **Communication**

- Notify affected stakeholders throughout the change process.

## 6. Documentation Requirements

- Change Request (CR) form with details and approvals.
- Impact and risk assessments.
- Implementation plan and rollback/contingency plans.
- Updated system/process documentation and records of communications.
- Post-implementation review and closure summary.

## 7. Reference Documents

- Change Request Form Template
- Change Management Policy
- Incident Management SOP
- Risk Assessment Procedure

## 8. Revision History

Version	Date	Description	Author
1.0	2024-06-27	Initial template release	SOP Team