

# SOP: Change Request Initiation and Documentation

This SOP defines the process for **change request initiation and documentation**, detailing the steps for identifying, submitting, and recording change requests within a project or organizational framework. It ensures that all proposed changes are properly documented, evaluated, and tracked to maintain project integrity, facilitate communication among stakeholders, and support informed decision-making throughout the change management lifecycle.

## 1. Purpose

To formalize the process for initiating and documenting change requests to ensure consistent evaluation, tracking, and communication of changes within [Project/Organization Name].

## 2. Scope

This procedure applies to all team members, stakeholders, and departments involved in [Project/Organizational] change management.

## 3. Definitions

Term	Definition
Change Request (CR)	A formal proposal for an alteration to any aspect of the project's scope, schedule, cost, or deliverables.
Change Log	A documented record of all submitted, approved, or rejected change requests.
Change Control Board (CCB)	The group responsible for reviewing, approving, or rejecting change requests.

## 4. Responsibilities

- **Initiator:** Identifies and submits the change request with appropriate supporting information.
- **Project Manager/Change Manager:** Reviews submitted requests for completeness, assigns tracking number, and ensures documentation.
- **Change Control Board (CCB):** Evaluates, approves, or rejects requests; communicates decisions to relevant stakeholders.
- **Stakeholders:** Provide input and feedback during the assessment of the proposed change.

## 5. Procedure

1. **Identification of Change**
  - Any team member or stakeholder may identify the need for a change due to new information, issues, or opportunities.
2. **Submission of Change Request**
  - Initiator completes a Change Request Form, including:
    - Description of the proposed change
    - Justification/reason for the change
    - Impact analysis (scope, timeline, cost, resources, quality, risk)
    - Date of request and contact information
  - The form is submitted to the Project/Change Manager.
3. **Documentation and Logging**
  - Project/Change Manager reviews the form for completeness and assigns a unique Change Request ID.
  - Details are recorded in the Change Log for transparency and tracking.
4. **Initial Review**
  - Project/Change Manager assesses the preliminary impact and forwards the request to the Change Control Board.
5. **Evaluation and Decision**
  - CCB evaluates the request, consults relevant stakeholders, and documents the decision (approve/reject/defer).
  - The outcome and rationale are recorded in the Change Log.

## 6. Communication

- Project/Change Manager communicates the decision and next steps to the initiator and affected parties.

## 7. Implementation (if Approved)

- Approved changes are scheduled, implemented, and monitored according to project plans.
- All actions are documented and tracked in project records.

## 6. Documentation

- Change Request Form (template attached/linked)
- Change Log (centralized record, e.g., spreadsheet or tracking system)
- Approval records and communications

## 7. References

- [Project/Organizational Change Management Policy]
- [Related SOPs, if applicable]

## 8. Change Request Form Template

Field	Description
Change Request ID	Unique identifier for the change request
Requestor Name & Contact	Name, department, and contact details
Date Submitted	Date the request is submitted
Change Description	Summary of proposed change
Reason/Justification	Why the change is needed
Impact Assessment	Effects on scope, cost, schedule, resources, quality, risk
Decision	Approved / Rejected / Deferred
CCB Comments	Review notes and rationale

**Version:** 1.0    **Effective Date:** [Date]

**Approved by:** [Name/Title]