

How to Document the Post Implementation Review

From the official Change Management Procedure: “A post-implementation review is conducted to ensure the change has achieved the desired goals. All moderate, high and major risk changes must be reviewed by the appropriate Change Coordinator and Change Manager. In addition to making a success or failure decision on the change implementation, the review should also consider how the change was deployed, and whether it was implemented by the established date and within the approved budget. Post-implementation actions include deciding to accept, modify or back-out the change; contacting the end user to validate success; and finalizing the change documentation in ITSM Change Management.”

1. Standard, Normal and Emergency Change Control records will automatically create a **Post Implementation Review** Task under the Tasks tab. (See Note 1 for how Latent changes will address the Post Implementation Review).
2. The Task starts off Staged (inactive) but becomes Pending (Active) after Approval.

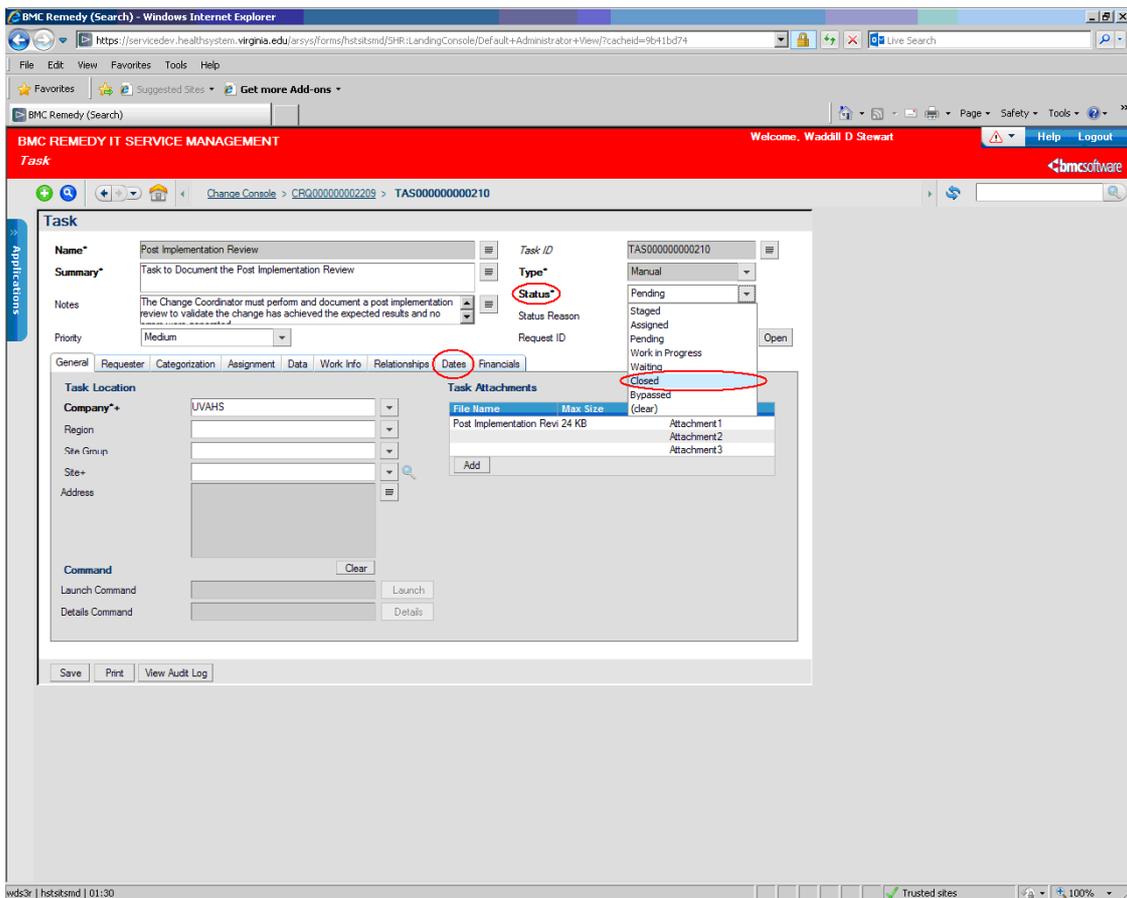
The screenshot displays the BMC Remedy IT Service Management interface. The main window shows a Change record for ID CRQ00000002209, currently in the 'Implement' stage. The 'Tasks' tab is selected, showing a table with one entry: a 'Post Implementation Review' task with ID TAS00000000210 and a status of 'Pending'. The interface includes various navigation and configuration options on the left and right sides.

Type	Name	ID	Instance	Sequence	Status
Task	Post Implementation Review	TAS00000000210	1		Pending

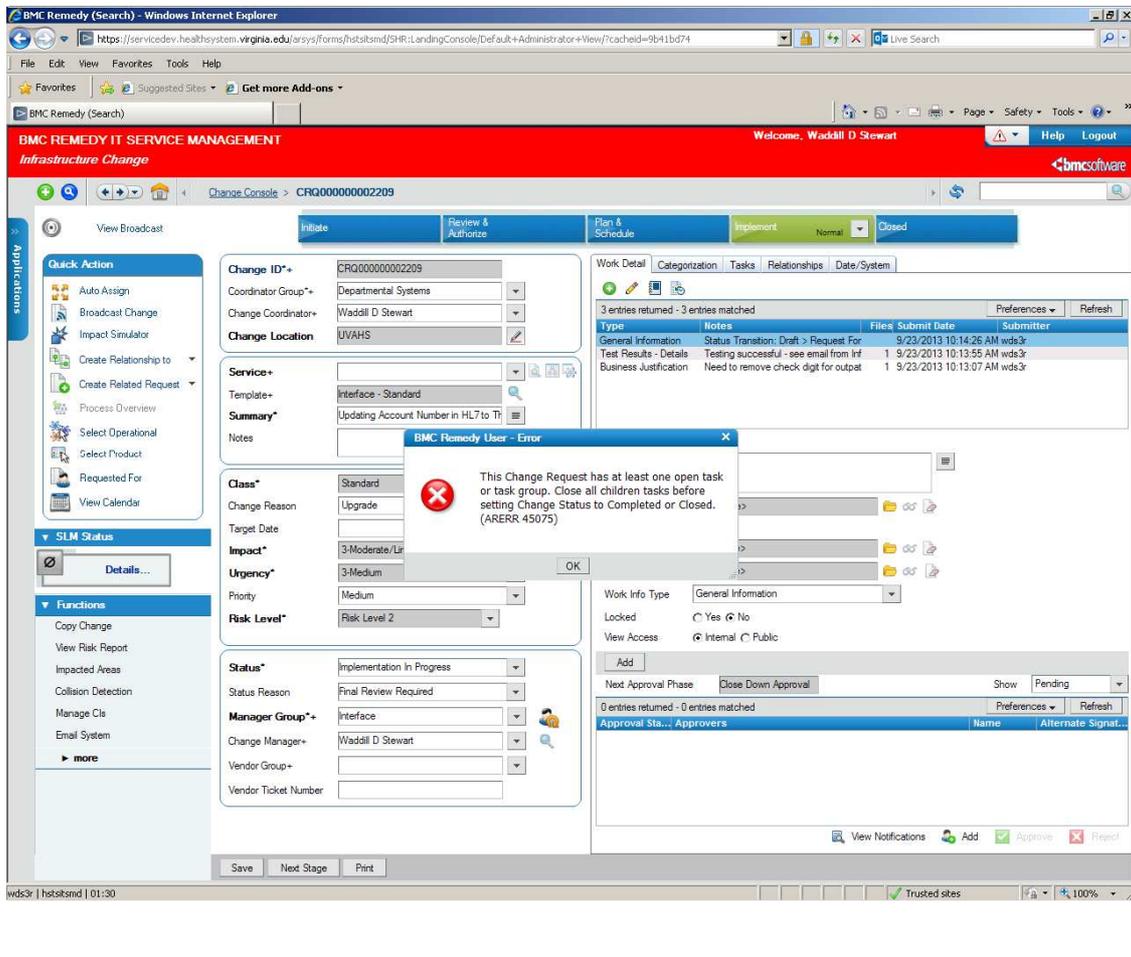
- The employee coordinating the change must add a Work Detail entry using the Work Info Type = Post Implementation Review to document verification of a successful change. The documentation should confirm the change achieved the desired results and the changed item was checked for proper operation *see note 2*.

The screenshot displays the BMC Remedy IT Service Management interface. The main window shows a change console for CRQ00000002209. The 'Work Info Type' dropdown menu is open, and 'Post Implementation Review' is highlighted. The interface includes a navigation pane on the left with sections for 'Quick Action', 'SLM Status', and 'Functions'. The main content area is divided into several sections: 'Change ID*', 'Coordinator Group*', 'Change Location', 'Service+', 'Template+', 'Summary*', 'Notes', 'Class*', 'Change Reason', 'Target Date', 'Impact*', 'Urgency*', 'Priority', 'Risk Level*', 'Status*', 'Status Reason', 'Manager Group*', 'Change Manager*', 'Vendor Group*', and 'Vendor Ticket Number'. The 'Work Detail' section on the right shows a table of 3 entries returned, with columns for Type, Notes, Files, Submit Date, and Submitter. The 'Work Info Type' dropdown menu is open, showing a list of options including 'Requirements', 'Business Justification', 'Analysis', 'Change Assessment', 'Potential Problems', 'Risk Assessment', 'Service Impact Assessment', 'Build', 'Backout Plan', 'Business Design', 'Development', 'Install Plan', 'Technical Design', 'Test Plan', 'Execution', 'Backout Results - Details', 'Install Results - Details', 'Test Results - Details', 'Closure', 'Cancellation Information', 'Post Implementation Review', 'Audit', 'Configuration Audit', 'SLM Compliance Audit', 'SLM Process Review', 'General', 'General Information', 'Rejection Information', 'Email System', 'Paging System', 'Chat', and '(clear)'. The 'Post Implementation Review' option is circled in red.

4. The Task status must be set to Closed before the Change Control request can be completed.
5. Click the Tasks tab and double-click the Task to open it. Set the Status = Closed. A Task requires Start/End dates to indicate when the post implementation review occurred. Click Save when done.
6. Completing this Task automatically Completes the Change Request since this is the last step in performing the change.



- The system will prompt you and not allow you to Complete the change request if the Task is not completed.



Note 1 – Latent Change Post Implementation Review

- Latent changes have already occurred (perhaps overnight to resolve an outage) but we still need to verify and document our changes worked with a Post Implementation Review.
- The employee coordinating the Latent change must add a Work Detail entry using the Work Info Type = Post Implementation Review to document verification of a successful change. The documentation should confirm the change achieved the desired results and the changed item was checked for proper operation see note 2.

Note 2 – A post implementation review is required for all production changes. The documentation added to the Work Detail may be unique to each team given the technologies being changed and the available methods to validate. Examples/suggestions include:

- Application screenshots that reflect the desired change;
- Email confirmation from an appropriate person acknowledging the change is having the desired effect;
- A system administrator changing backend infrastructure/configuration with no observable impact may state they verified proper operation (example – adding a data file to an Oracle database to avoid running out of space. There is no user confirmation. The person making the change needs to verify the change was successful and confirm the dependent applications were not impacted.