Outcome and Learning Record

Complete the first row before the change, the second after observation, and the third for the decision and continuing learning.

Case / workflow	Canvas / revision	Linked records	Decision owner	Facilitator / participants	Date

BEFORE THE CHANGE

01 Intervention and expected effect

Describe the complete change, the problem, intended outcome and why it should help. Separate AI's expected contribution from other changes. Link the review and any AI canvas.

02 Cases and comparison

Define eligibility, exclusions, allocation, intake and follow-up, unit and expected count. Record comparison, other changes and handling of missing or incomplete cases.

03 Measures and decision rules

Agree baselines, targets, quality limits, units, definitions, denominators, sources and collection owner. Include checking and correction effort. Set review date, pause and restart conditions before results.

AFTER THE OBSERVATION PERIOD

04 Observed results

Record actual values, counts, periods and source IDs against the original criteria. Compare outcome, quality and effort. Retain missing data and limits.

05 Exceptions and deviations

Record unintended effects, incidents, changes to the plan and corrective work. Distinguish defects caught during review from errors reaching customers or other affected people.

06 Explanations and uncertainty

What supports or contradicts the expected effect? Consider case mix, staffing, workload, learning, other changes and measurement differences. Identify further evidence needed. Separate package effects from AI-only effects.

DECISION AND LEARNING

07 Decision and accountability

Continue, adapt, stop or gather more evidence? Record the basis, scope, conditions, decision owner, date and next review.

08 Changes to retain

Which knowledge, policy, decision record, handoff, training or configuration changes? Record location or version, owner, due date, communication and completion evidence.

09 Persistence and record history

Set a later review of cases, including use by another person. Keep revision history, unresolved questions and evidence links. Record who checks continued use and what triggers another review.

Record sources and dates. Separate observations, interpretations and unknowns. Mark Not applicable with a reason.

Founded by Intent & Effect, developed by the OIBOK community.

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