

1. Agree on the handoff scope

For solo web designers building small brochure sites. Use one packet per project; copy page 2 for each required item and page 3 for each replacement. Keep source files in your existing project folder.

Project alias / project folder reference (no credentials)

Demo project: Cedar Studio brochure site (fictional)

Review date and time zone / next agreed review

2026-10-12, America/New_York; next review Oct 14

Included pages and required content IDs (e.g. HOME-COPY, HOME-HERO)

HOME-COPY and HOME-HERO required. SERVICES-COPY deferred by client.

Excluded or deferred pages/items, approving person and decision reference

Services page outside first handoff; demo note S-01 accepted by Alex.

Content owner / person authorized to approve / designer

Owner/approver: Alex (fictional client). Designer: Sam (fictional).

Before recording an item

- ☒ Required items are agreed, not inferred from an empty template.
- ☒ The client has identified who may approve the content.
- ☒ The working folder and exact version naming are agreed.

Use short references. Do not paste passwords, access tokens, private client data or licensed files into this packet. An evidence reference is not proof unless someone reviews it.

Manual record. No automatic checking, uploads, reminders or approval.

2. Record one exact content item

Duplicate this page per item. A receipt, an approval and a permitted-use decision are separate facts. Mark unknowns as pending. Reference exact filenames or version IDs.

Item ID / page / type (copy, image, logo, form routing)

HOME-HERO / Home / image

Required now / optional / deferred + agreed decision reference

Required now; demo scope S-01

Responsible owner / agreed next action date

Alex; next action Oct 14

Received filename or copy snapshot version / receipt date

hero-v2.jpg received Oct 12

Approved exact version / approver / approval date / saved evidence reference

PENDING. Approval A-01 covers hero-v1.jpg only.

Image/logo use decision and evidence / credit terms; or explained N/A

PENDING. Client must review replacement image use basis and credit.

Alt text or decorative decision / contact routing check / relevant manual review

Recheck alt text after image replacement; pending.

Current state + remaining issue, next action and owner

REAPPROVE. Alex to approve v2 and resolve use basis by Oct 14.

Manual gate: REQUIRED items remain blocked if the content is missing, approval names another version, use basis is unresolved, or a required review remains open. Optional and deferred items stay visible; they are not automatically waived.

Suggested states: MISSING / REVIEW / REAPPROVE / USE BASIS PENDING / MANUALLY REVIEWED. The last state describes this record only; it is not a launch, legal or accessibility certification.

Manual record. No automatic checking, uploads, reminders or approval.

3. Handle a change after approval

Receipt of a replacement does not inherit the old approval. Keep the old file as superseded; never silently replace the recorded approved version.

Changed item ID / request date / request owner

HOME-HERO / Oct 12 / Alex

Previously approved version / old approval reference

hero-v1.jpg; demo approval A-01 Oct 10

Replacement version / what changed

hero-v2.jpg; different image, received Oct 12

Affected page, placement, alt text, credit, copy, links or form routing

Home hero, alternative text and credit line

New-version approval reference, approver and date (pending if absent)

PENDING. Do not apply A-01 to v2.

Use basis / credit / relevant review to recheck for the replacement

Replacement image use evidence, credit terms and alt text pending.

Close the version loop manually

- ☒ Old version is marked superseded in the working folder.
- ☐ Approval evidence explicitly matches the replacement version.
- ☐ Affected use, credit and content reviews have been checked.

Result: HOLD or handoff cleared by whom, when and with what limits

HOLD. Sam on Oct 12; v2 is not cleared for handoff.

Manual record. No automatic checking, uploads, reminders or approval.

4. Send a bounded handoff

Review every required item page and replacement page before handing content to the build.
Put every unresolved item in the issue list, including optional items.

Project alias / packet review date / reviewer

Cedar Studio / Oct 12 / Sam

Required item IDs and approved versions included in this handoff

HOME-COPY v3 / demo approval A-02 Oct 11. HOME-HERO not cleared.

Unresolved REQUIRED items: ID, reason, owner, next date

HOME-HERO: v2 approval/use/alt pending; Alex; Oct 14.

Optional/deferred items: agreed fallback, who accepted it and evidence

SERVICES-COPY: outside first handoff; demo S-01 accepted by Alex.

Decision: HOLD / PARTIAL handoff / all required records reviewed; limits

PARTIAL handoff: HOME-COPY v3 only. Keep hero replacement on HOLD.

Recipient / sent date / acknowledgement reference (pending if absent)

Sam build folder; demo handoff H-01 Oct 12; acknowledgement pending.

What this packet does and does not establish

It records human review of named content versions and remaining issues. It does not inspect files, verify licenses, check live links, certify accessibility, confirm a legal release or authorize launch. Final build QA and client launch approval remain separate.

After sending, keep the packet with its source references. If a required item changes, create a new change page and reissue the affected handoff; do not treat this summary as permanent approval.

Manual record. No automatic checking, uploads, reminders or approval.