

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)

Review date and time zone / next agreed review

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

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

Content owner / person authorized to approve / designer

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)

Required now / optional / deferred + agreed decision reference

Responsible owner / agreed next action date

Received filename or copy snapshot version / receipt date

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

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

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

Current state + remaining issue, next action and owner

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 Keep the old file as superseded; never silently replace the recorded approved version.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

Previously approved version / old approval reference

Replacement version / what changed

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

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

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

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

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

Required item IDs and approved versions included in this handoff

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

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

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

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

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.