# Source handoff checklist

## Quick start and fictional worked example

Give the next person enough context to find a source and understand what happened to it.

1. Name the question and point to the source.
2. Record the changes between the source and what you are sharing.
3. Have a colleague try the handoff and note where they get stuck.

**A useful finish: The next person can retrace the reference and see what has and has not been checked.**

**FICTIONAL EXAMPLE / Adapt the process, not the facts.**

| | |
|---|---|
| **Claim or question** | Does the fictional supplier register show supplier 42 as approved? |
| **Source reference and access** | Export EX-12, row 42, in the restricted supplier folder. Request access from the coordinator. |
| **Creator and date** | Coordinator exported the file on 12 October 2026. Original editor is unknown. |
| **Changes made along the way** | Row 42 copied into a briefing; other rows omitted. Original export retained. |
| **What was checked** | Compared the copied row with EX-12. Did not verify the approval event. |
| **What the next person needs** | Ask for the approval record before treating the status value as proof of a completed approval. |

# Source handoff checklist

## Your worksheet / Start here

Type into the boxes or print these two pages. Save a copy and reopen it to check your entries. For longer notes, use the text template or browser tool.

### 1. Claim or question

State the question the source is being used to answer.

### 2. Source reference and access

Record a stable reference and who may access it.

### 3. Creator and date

Separate what is known from what has not been established.

# Source handoff checklist

## Your worksheet / Continue and review

Type into the boxes or print these two pages. Save a copy and reopen it to check your entries. For longer notes, use the text template or browser tool.

### 4. Changes made along the way

Note exports, cropping, filtering, transcription or other transformations.

### 5. What was checked

Record the checks you actually performed and their limits.

### 6. What the next person needs

Name missing context, access needs and a useful next action.

**Before you finish: The next person can retrace the reference and see what has and has not been checked.**

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