Handover Note Template
Worked Example

October 2026

A made-up program. All names, places, organizations and figures are invented.

Handover

The Task in One Line
Prepare the office supplies request for office manager approval.

How Often and by When
Every Monday before 11 am.

Where Things Are Kept
Supplies tracker and sample request: shared Supplies folder.

The Steps
First open Supplies tracker. Then identify low rows. Then copy their items into the sample request. Then send the draft to office manager. Then mark draft sent in the team task list. Success sign: the completed task list entry.

Step	Action	How to Tell It Worked
1	Open Supplies tracker.	Not stated, ask the owner.
2	Identify rows marked low.	Not stated, ask the owner.
3	Copy those items into the sample request.	Not stated, ask the owner.
4	Send the draft to the office manager.	Not stated, ask the owner.
5	Mark the draft sent in the team task list.	The completed task list entry.

What Goes Wrong
If an item has no description, stop and ask office manager.

Who to Contact
Office manager for questions. ASK: current supplier contact.

What Not to Touch
Hand over: prepare and send the draft. Keep: purchase approval and supplier-detail changes. Decide first: supplier contact must be confirmed before contacting the supplier.

Where to Ask for Access
Ask office manager through the approved access process. Sensitive items removed: none. No passwords or private contact details were supplied.

Source Notes

Task: prepare the office supplies request every Monday before 11 am for office manager approval.

Supplies tracker and sample request are in the shared Supplies folder.

First open Supplies tracker. Then identify rows marked low. Then copy those items into the sample request. Then send the draft to the office manager. Then mark the draft sent in the team task list.

The helper may prepare and send the draft. The office manager alone approves purchases and changes supplier details.

If an item has no description, stop and ask office manager. If access is missing, ask office manager through the approved access process.

Supplier contact is not given. No passwords or private contact details were supplied. The completed task list entry is the success sign.

Illustrative example. All details are invented. This is a manually prepared example, not a model run.

Checks

Check	Finding
Sort every task piece hand over, keep or decide first with a source-backed reason. Invent no piece, contact or number. List required files, materials and approved access routes.	NOT RUN. Criterion for reader review. Actual function results are in browser_checks; no AI judgment is claimed.
Use only handed-over pieces. Give steps in source order, one action each, with where to find material and how to tell it worked. Keep traps under Watch for and retained decisions under Stop and ask.	NOT RUN. Criterion for reader review. Actual function results are in browser_checks; no AI judgment is claimed.
Remove credentials, account/card numbers, private contact/address or personal details and nonshareable prices. Replace with where to ask without repeating values. If unsure, treat as sensitive and stop until safe.	NOT RUN. Criterion for reader review. Actual function results are in browser_checks; no AI judgment is claimed.

Check	Finding
Read as a newcomer, quote unclear spots exactly, and answer only from notes. Keep every unresolved detail as ASK in Still to fill in; invent nothing.	NOT RUN. Criterion for reader review. Actual function results are in browser_checks; no AI judgment is claimed.
Include Sensitive items removed: with kinds or none. For AI use keep original result counts, quoted questions and check evidence, and verify the response format against the unchanged companion.	NOT RUN. Criterion for reader review. Actual function results are in browser_checks; no AI judgment is claimed.
Read line by line as if forwarded and confirm privacy. Have a new reader try the first three steps. Only the owner decides whether it is safe to hand over and what fills each ASK line.	NOT COMPLETED. Human confirmation has not occurred.