

Freelance Delivery Handover Pack

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List what has been delivered, where the client can find it and which questions remain open. Use the pack to support a clear review and handover conversation.

Use alongside the agreed contract or scope. This pack does not change payment terms, transfer intellectual property or establish client acceptance by itself. Use fictional details for practice.

How to use the record

1. Match each deliverable to the agreed scope and identify its current version.
2. Record its authorised location and instructions needed to open or use it.
3. Separate completed work, known limitations and outstanding actions.
4. Ask the client to review through the agreed process and record the outcome honestly.

Fictional worked example

Engagement: Fictional three-page portfolio website draft.

Delivered items: Homepage v1, service page v1 and contact page v1 in the agreed review folder.

Use instructions: Open the preview links and send comments against the agreed review questions.

Known limitation: Contact form uses practice values and is not approved for live use.

Outstanding action: Client to confirm the wording before a separate publication decision.

Review status: Delivered for review; client acceptance has not been recorded.

Complete your own record

Word: replace the guidance in the right column and add space or rows as needed. PDF: print this page and write your entries; it is not an interactive form. Save your own working copy with a clear filename and version.

Record field	Your entry
Engagement reference and handover date	[Enter your details here]
Agreed scope or contract reference	[Enter your details here]
Deliverable list with versions	[Enter your details here]
Authorised file locations and use instructions	[Enter your details here]
Checks completed and evidence references	[Enter your details here]
Known limitations and outstanding actions	[Enter your details here]
Client review outcome and acceptance reference	[Enter your details here]
Support boundaries next action and owner	[Enter your details here]

Review before using the record

Confirm that access works for the intended client and that unresolved items have an owner. Keep review comments and any acceptance reference with the handover record. Agree additional work through the existing change process.

Keep the unedited master separate from your completed working copy. Store sensitive information only in an authorised location. Original RDE practice aid; no guarantee of employment, business results or compliance.