WORKING RESOURCE / 2026

Scope and document control kit

Working records for scopes, changes, reviews, versions and signing evidence.

How to use this kit

- [ ] Choose the worksheet for the task you are reviewing with the client.
- [ ] Complete the fields, then record evidence for each completion check.
- [ ] Name an owner for unresolved items and agree the next review date.
- [ ] Use the editable Markdown and CSV companions when you need more space.

Included worksheets

01 Estimate or quote decision

02 Scope of work worksheet

03 Proposed change record

04 Approval register and pre-send check

05 Revision register and retrieval check

06 Signature evidence review

These are operational worksheets, not a complete contract or a guarantee of legal validity. Have appropriate reviewers assess the terms and retention requirements.

Editable files: getmanageit.io/downloads/manageit/scope-document-kit-editable.zip

WORKSHEET 01

Estimate or quote decision

Record uncertainty before choosing the document and price wording.

Client: _____ Owner: _____ Date: _____

1. Customer and service

2. Known work and unresolved facts

3. Estimate range or quoted price basis

4. Assumptions and exclusions

5. Information needed before a firm offer

6. Timing, validity and availability

7. Acceptance or next assessment action

8. Document owner and review date

Completion checks

- [ ] The document states what is still uncertain
- [ ] A quote identifies its defined scope
- [ ] Legal effects are not inferred from the heading alone
- [ ] The customer has a clear next step

WORKSHEET 02

Scope of work worksheet

Describe the result, boundaries and completion check in the client's terms.

Client: _____ Owner: _____ Date: _____

1. Parties, project and document reference

2. Purpose and result sought

3. Deliverables and quantities

4. Exclusions and boundaries

5. Client inputs and dependencies

6. Dates, milestones and assumptions

7. Acceptance test and decision owner

8. Price reference and change process

Completion checks

- [ ] The delivery team can explain what is included
- [ ] The customer can identify their responsibilities
- [ ] Completion can be checked against an observable result
- [ ] Commercial and legal terms receive appropriate review

WORKSHEET 03

Proposed change record

Compare the proposed change with the accepted scope before starting extra work.

Client: _____ Owner: _____ Date: _____

1. Change ID and original agreement version

2. Requested by, date and reason

3. Current scope or requirement

4. Proposed addition, removal or replacement

5. Price/currency and payment impact

6. Schedule and dependency impact

7. Approval owner, status and evidence

8. Affected records and update owner

Completion checks

- [ ] Proposed is distinguished from approved
- [ ] Cost and timing effects are shown together
- [ ] Accepted evidence identifies the exact change
- [ ] Working records are updated after approval

WORKSHEET 04

Approval register and pre-send check

Connect each decision to an identifiable document version.

Client: _____ Owner: _____ Date: _____

1. Document ID, type and version

2. Author and working location

3. Required reviewers and decision scope

4. Checks for scope, price, terms and recipient

5. Reviewer decision and date

6. Requested changes and resolution

7. Final release authority and evidence

8. Recipient, current link and send owner

Completion checks

- [ ] All required decisions refer to the same version
- [ ] Material revisions return to the appropriate reviewer
- [ ] Internal review is separate from customer signing
- [ ] The released copy matches the approved copy

WORKSHEET 05

Revision register and retrieval check

Use a stable document ID plus a revision and status; preserve accepted records.

Client: _____ Owner: _____ Date: _____

1. Document ID and title

2. Version identifier and date

3. Author and change summary

4. Status: draft, approved, sent or superseded

5. Approval or acceptance reference

6. Working and retained-copy locations

7. Prior version and replacement relationship

8. Access owner and retention decision

Completion checks

- [ ] Another authorized person can find the accepted version
- [ ] A filename alone is not assumed to provide history
- [ ] A new draft does not overwrite the earlier agreement
- [ ] Material changes receive a recorded review

WORKSHEET 06

Signature evidence review

Review an authorized sample and retain matching records according to the business's rules.

Client: _____ Owner: _____ Date: _____

1. Document reference and exact version

2. Signer and intended role

3. Invitation and recipient details

4. Recorded events, times and time zone

5. Authentication evidence actually available

6. Completion status and exceptions

7. Completed document and evidence locations

8. Access, retention and retrieval owner

Completion checks

- [ ] Evidence belongs to the same completed document
- [ ] The sequence and status can be explained
- [ ] Missing events are investigated without inventing proof
- [ ] A second authorized person can retrieve the records