

Build a connected evidence workflow

A fillable planning workbook for five connected lessons and one practical pilot.

Use the fictional course example first. Then adapt the five-part plan to your own collection, analysis and reporting workflow. Record the sources, definitions, review decisions and access needed to make it useful.

Download and open this PDF in a PDF reader that supports forms. Type in the shaded boxes and save a copy. You can also print it and write by hand. Some browser viewers handle saving differently: reopen your saved copy to check your answers.

Use fictional or de-identified material for practice. This workbook does not send or store your answers on a website. Completion is a planning exercise, not certification of an implemented system.

Your workflow and decision question and one workflow to test

Who will help you test the plan? Record the owner and a review date.

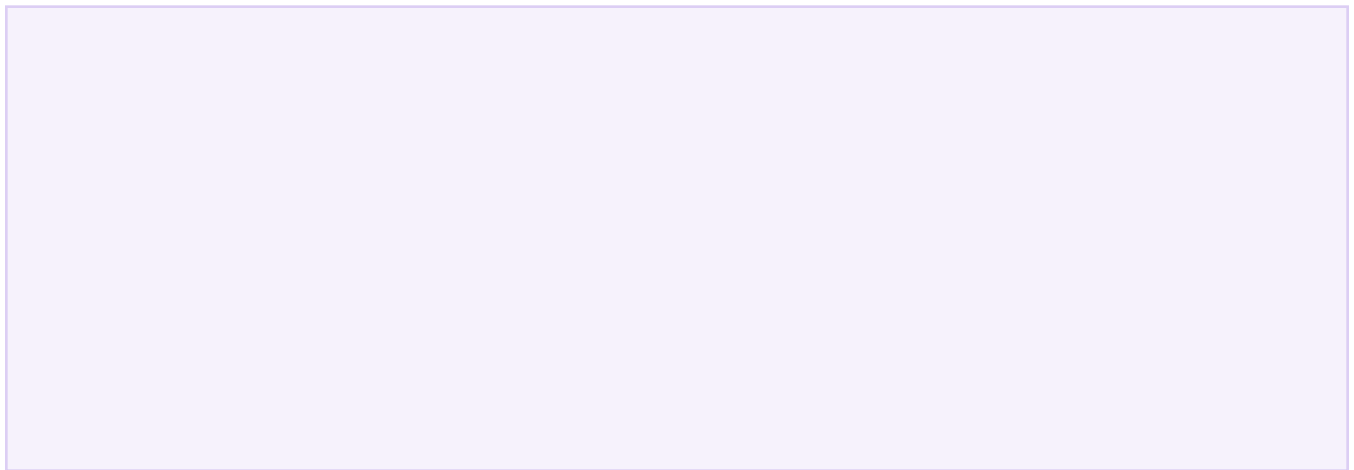
1. Map the collection

A source and handoff map linking partner records, work orders and site confirmations.

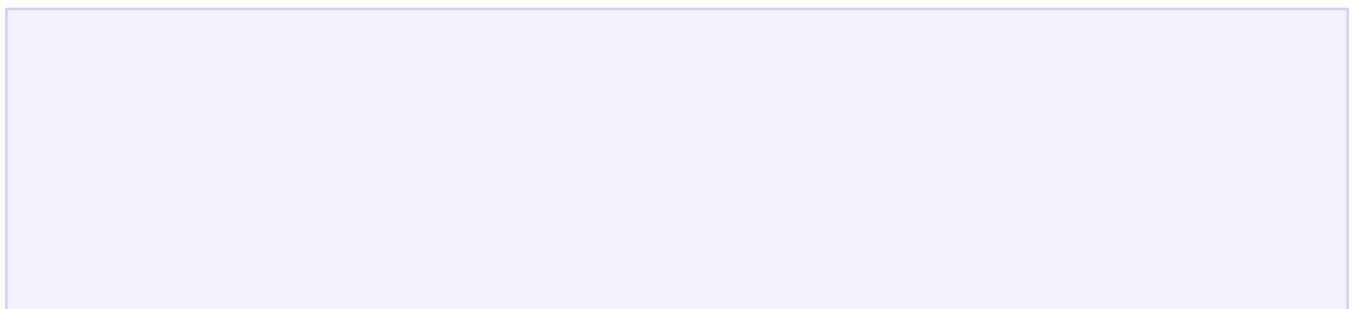
Practice context: Partner record - What was sent or performed - Partner, work order and event date;

Site confirmation - What was received or accepted - Receiving site and responsible contributor

On workbook page 2, map one goods or service handoff. Specify the source, owner, identifier and acceptance evidence at each step. Identify the few shared fields, the local fields and which profile details should be reused or updated.



Name shared and local fields. Which profile details can be reused, and when do they change?



Self-check: Can another team tell what is confirmed and what is still only reported?

2. Review the exception

An exception record containing the mismatch, sources, clarification and resolution.

Practice context: Observe - 120 kg versus six bags - Units are not yet comparable; Clarify - Request the documented bag basis - Keep original entries

On workbook page 3, write the W-8 exception and the evidence required to resolve it. Include who owns the clarification.



Record your decision, unresolved question, owner and next review date.



Self-check: Could another reviewer repeat your reasoning from the recorded evidence?

3. Connect the handoffs

A relationship map preserving partner activity, site confirmations and corrected records.

Practice context: Partner - P-12 - Organization and contributor roles; Work order - W-8 - Scope and expected handoffs

On workbook page 4, map a partial receipt followed by a corrected confirmation. Show how a reviewer traces both to W-8.



Record your decision, unresolved question, owner and next review date.



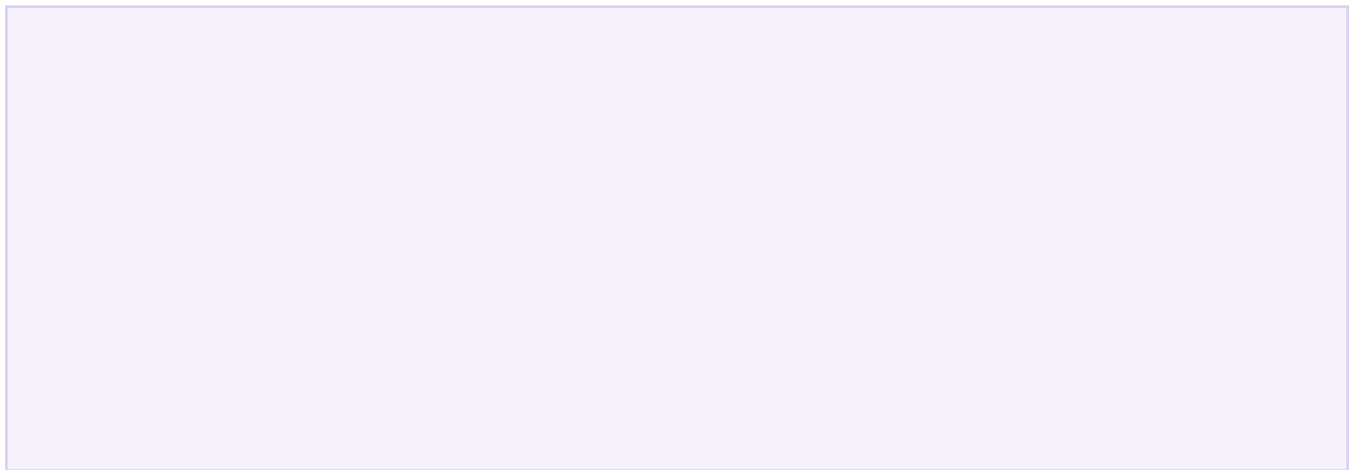
Self-check: Can someone reconstruct what happened in order, including what changed later?

4. Agree the definitions

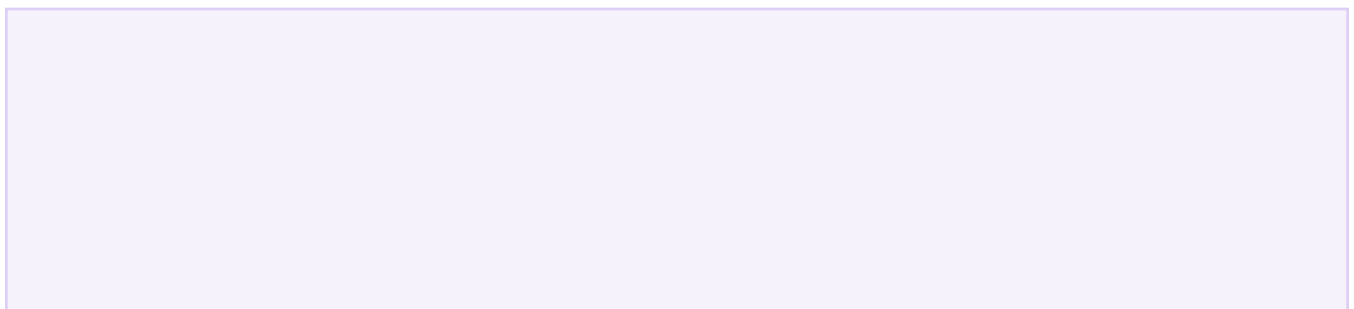
A practical dictionary of units, statuses, evidence and comparison boundaries.

Practice context: Quantity - Unit and approved conversion - Do not infer bag weights; Timing - Dispatch, receipt or acceptance date - Do not mix event clocks

On workbook page 5, define one goods or service unit and two acceptance statuses. State a claim that your evidence does not support. Map one local field to a common definition. Give one example that must remain separate.



Map one local field to a shared definition. What cannot be combined, and why?



Self-check: Could two partners interpret the same request consistently?

5. Govern and resolve

A role and resolution plan tested across one complete handoff.

Practice context: Partner - Source submission and clarification - Accepted status or precise question;
Receiving site - Confirmation evidence - Resolution and remaining action

On workbook pages 6 and 7, assign roles and run W-8 end to end. Include an unresolved issue and a denied access request.

Record your decision, unresolved question, owner and next review date.

Self-check: Does every unresolved item have a person who knows what to do next?

Test the complete workflow

Use fictional records first, then agree a small authorized pilot with the responsible people.

- ☐ A contributor can submit the intended information.
- ☐ An unrelated reader cannot access restricted evidence.
- ☐ A correction preserves the original and its reason.
- ☐ A reviewer can trace a finding to its source and definition.
- ☐ The intended reader receives useful, approved findings.

Expected vs actual behavior: record gaps and the person responsible.

What will change before the next cycle? Include the next review point.