

# Productivity and Habits Reporting and Handover Template - Document Uncertainty and Limits

Productivity and Habits | Document Uncertainty and Limits | Asset ID TJ-15-10-13

A planning system should reduce friction, not create guilt. Adjust workload for health, disability, care duties and real constraints.

## Purpose and working method

This independent, printable companion helps you translate an intention into a small system that can be reviewed and improved while working toward one outcome: show what is unknown and how much it matters. Use a suitable calculator or utility for computation, then use these pages to preserve meaning, assumptions, checks and decisions. A number alone is not a decision record; a useful record shows where the inputs came from, why the method fits and what would make the result unsafe or misleading.

| Project snapshot     | Record                              |
|----------------------|-------------------------------------|
| Project or question  | _____                               |
| Prepared by / date   | _____                               |
| Decision owner       | _____                               |
| Intended outcome     | Document Uncertainty and Limits     |
| Tool or method used  | Name and version/date: _____        |
| Authoritative source | Title, owner and access date: _____ |
| Review deadline      | _____                               |

## Domain readiness map

| # | Input area             | Current state               | Trace         |
|---|------------------------|-----------------------------|---------------|
| 1 | Desired outcome        | Known / estimated / missing | Source: _____ |
| 2 | Current baseline       | Known / estimated / missing | Source: _____ |
| 3 | Available time         | Known / estimated / missing | Source: _____ |
| 4 | Triggers and obstacles | Known / estimated / missing | Source: _____ |
| 5 | Minimum action         | Known / estimated / missing | Source: _____ |
| 6 | Review rhythm          | Known / estimated / missing | Source: _____ |

## Reporting and Handover Template

This working page applies the reporting and handover template format to document uncertainty and limits. Complete it before polishing a conclusion. The useful evidence is ranges, sensitivity, missing evidence and exclusions; the governing rule is: escalate when uncertainty could reverse the decision.

| Record item            | Current state                                | Evidence location | Next owner |
|------------------------|----------------------------------------------|-------------------|------------|
| Desired outcome        | leave enough context for a new person to act | _____             | _____      |
| Current baseline       | leave enough context for a new person to act | _____             | _____      |
| Available time         | leave enough context for a new person to act | _____             | _____      |
| Triggers and obstacles | leave enough context for a new person to act | _____             | _____      |
| Minimum action         | leave enough context for a new person to act | _____             | _____      |
| Review rhythm          | leave enough context for a new person to act | _____             | _____      |

### Completion standard

- Write real units, dates and source owners; avoid labels such as normal, typical or standard without a definition.
- Mark estimates as estimates. Record a range when a single value would imply false precision.
- Keep an untouched copy of source data and give every working version a date or revision.
- Record contrary evidence. A workbook that only supports the preferred answer is not a reliable check.
- Remove personal, confidential or security-sensitive details that are unnecessary for the decision.

## Input and Data Map

**Privacy gate: minimise personal, confidential and security-sensitive information. If a value can identify a person, account, location or protected system, use an approved environment and retention rule.**

| # | Data element           | Minimum validation       | Source       | Status      |
|---|------------------------|--------------------------|--------------|-------------|
| 1 | Desired outcome        | identity and date        | Owner: _____ | Ready / gap |
| 2 | Current baseline       | definition and unit      | Owner: _____ | Ready / gap |
| 3 | Available time         | range and precision      | Owner: _____ | Ready / gap |
| 4 | Triggers and obstacles | missing-value rule       | Owner: _____ | Ready / gap |
| 5 | Minimum action         | consistency with peers   | Owner: _____ | Ready / gap |
| 6 | Review rhythm          | fitness for the decision | Owner: _____ | Ready / gap |

## Transformation trail

| Stage       | Question                                       | Record                    |
|-------------|------------------------------------------------|---------------------------|
| Raw input   | What arrived before cleaning or conversion?    | Location / version: _____ |
| Cleaning    | What was removed, repaired or standardised?    | Rule: _____               |
| Conversion  | Which units, formats or scales changed?        | Before / after: _____     |
| Derivation  | Which values were calculated from others?      | Method: _____             |
| Exclusion   | Which records or conditions were left out?     | Reason: _____             |
| Final input | What exact dataset or values entered the tool? | Hash / version: _____     |

## Spot-check sample

| Sample | Original      | Working value   | Comparison        | Decision         |
|--------|---------------|-----------------|-------------------|------------------|
| 1      | Source: _____ | Prepared: _____ | Difference: _____ | Accept / correct |
| 2      | Source: _____ | Prepared: _____ | Difference: _____ | Accept / correct |
| 3      | Source: _____ | Prepared: _____ | Difference: _____ | Accept / correct |
| 4      | Source: _____ | Prepared: _____ | Difference: _____ | Accept / correct |

## Document Uncertainty and Limits Action Workbook

Use this page to show what is unknown and how much it matters. The aim is not to fill every blank; it is to expose the few facts that could change the decision. The evidence package should contain ranges, sensitivity, missing evidence and exclusions.

| Action field        | Prompt                                        | Record |
|---------------------|-----------------------------------------------|--------|
| Decision to support | What choice or action will this work inform?  | _____  |
| Audience            | Who must understand or approve it?            | _____  |
| Success measure     | What observable result would count as useful? | _____  |
| Decision date       | When is evidence needed, and why then?        | _____  |
| Critical assumption | Which belief could reverse the conclusion?    | _____  |
| Missing evidence    | What is the most important current gap?       | _____  |
| Stop condition      | What result requires pause or escalation?     | _____  |

### Outcome-specific plan

| Step         | Required action                                              | Record                  |
|--------------|--------------------------------------------------------------|-------------------------|
| 1. Frame     | Restate document uncertainty and limits as a question        | Owner / due: _____      |
| 2. Gather    | Collect ranges, sensitivity, missing evidence and exclusions | Owner / due: _____      |
| 3. Calculate | Use inputs from desired outcome and current baseline         | Method / version: _____ |
| 4. Challenge | Test minimum action and review rhythm                        | Reviewer: _____         |
| 5. Decide    | Escalate when uncertainty could reverse the decision         | Decision: _____         |

### One-sentence brief

We need to decide \_\_\_\_\_ by \_\_\_\_\_. The current evidence suggests \_\_\_\_\_, but the decision could change if \_\_\_\_\_. The next owner is \_\_\_\_\_.

## Assumption and Source Register

Source gate: an online result is not automatically authoritative. Record the original owner, document or dataset, publication or revision date, access date and the exact field used. Recheck time-sensitive values before publication or commitment.

| ID | Item                   | Evidence class               | Trace         | Decision impact  |
|----|------------------------|------------------------------|---------------|------------------|
| A1 | Desired outcome        | Fact / estimate / assumption | Source: _____ | Low / med / high |
| A2 | Current baseline       | Fact / estimate / assumption | Source: _____ | Low / med / high |
| A3 | Available time         | Fact / estimate / assumption | Source: _____ | Low / med / high |
| A4 | Triggers and obstacles | Fact / estimate / assumption | Source: _____ | Low / med / high |
| A5 | Minimum action         | Fact / estimate / assumption | Source: _____ | Low / med / high |
| A6 | Review rhythm          | Fact / estimate / assumption | Source: _____ | Low / med / high |

## Units, dates and versions

| Control           | Review question                               | Record            |
|-------------------|-----------------------------------------------|-------------------|
| Units             | Are symbols and conversion factors explicit?  | Checked by: _____ |
| Time basis        | Instant, daily, monthly, annual or lifecycle? | Basis: _____      |
| Currency / locale | Currency, tax location and rounding rule?     | Basis: _____      |
| Version           | Which tool, formula, policy or data revision? | Version: _____    |
| Applicability     | Why does the method fit this case?            | Reason: _____     |
| Exclusions        | What important factor is outside the model?   | Record: _____     |

## Assumption challenge

- What direct evidence would replace the largest assumption?
- Which assumption is both uncertain and capable of changing the decision?
- Would an independent person interpret every field the same way?
- Has a current authoritative source been checked for rates, limits, laws, standards or safety boundaries?
- Who is qualified to approve this use of the result?

## Scenario Comparison Matrix

Scenario work reveals whether document uncertainty and limits stays stable or depends on a narrow assumption. Change a driver deliberately, retain the same definitions and explain why each value is credible. Do not label an optimistic case as expected simply because it is preferred.

| Driver                 | Low / adverse       | Working case    | High / favourable | Reason        |
|------------------------|---------------------|-----------------|-------------------|---------------|
| Desired outcome        | Conservative: _____ | Expected: _____ | Stretch: _____    | Source: _____ |
| Current baseline       | Conservative: _____ | Expected: _____ | Stretch: _____    | Source: _____ |
| Available time         | Conservative: _____ | Expected: _____ | Stretch: _____    | Source: _____ |
| Triggers and obstacles | Conservative: _____ | Expected: _____ | Stretch: _____    | Source: _____ |
| Minimum action         | Conservative: _____ | Expected: _____ | Stretch: _____    | Source: _____ |
| Review rhythm          | Conservative: _____ | Expected: _____ | Stretch: _____    | Source: _____ |

## Outcome comparison

| Comparison                    | Conservative        | Expected            | Stretch             |
|-------------------------------|---------------------|---------------------|---------------------|
| Calculated result             | _____               | _____               | _____               |
| Time implication              | _____               | _____               | _____               |
| Cost or resource implication  | _____               | _____               | _____               |
| Quality or performance effect | _____               | _____               | _____               |
| Risk and reversibility        | _____               | _____               | _____               |
| Evidence confidence           | Low / medium / high | Low / medium / high | Low / medium / high |

## Sensitivity note

The conclusion changes most when \_\_\_\_\_ moves from \_\_\_\_\_ to \_\_\_\_\_. That driver is supported by \_\_\_\_\_. Before commitment, we will \_\_\_\_\_.

## Verification and Decision Gate

**High-stakes gate:** A planning system should reduce friction, not create guilt. Adjust workload for health, disability, care duties and real constraints. For any consequential use, a qualified professional must verify the current authoritative source, inputs, method and limits. A completed workbook does not grant legal, financial, medical, engineering, laboratory, security, operational or safety approval.

| Gate               | Acceptance condition                                   | Status     | Evidence |
|--------------------|--------------------------------------------------------|------------|----------|
| Input trace        | Every critical value has a source, date and unit       | Pass / gap | _____    |
| Independent check  | A second method or reviewer could expose an error      | Pass / gap | _____    |
| Applicability      | The method fits the case and stated boundary           | Pass / gap | _____    |
| Range              | A plausible low and high case has been tested          | Pass / gap | _____    |
| Contrary evidence  | Conflicts are recorded and explained                   | Pass / gap | _____    |
| Privacy and rights | Sensitive and third-party material is controlled       | Pass / gap | _____    |
| Qualified review   | Required professional or authorised review is complete | Pass / gap | _____    |

## Decision record

| Decision field     | Choice                                  | Record           |
|--------------------|-----------------------------------------|------------------|
| Recommendation     | Proceed / revise / pause / reject       | Reason: _____    |
| Confidence         | Low / medium / high                     | Evidence: _____  |
| Conditions         | What must stay true?                    | Record: _____    |
| Reversal trigger   | What new evidence reopens the decision? | Record: _____    |
| Owner and approval | Who owns the decision and its limits?   | Name/date: _____ |

## Final rule

For document uncertainty and limits, escalate when uncertainty could reverse the decision. Record the decision separately from the calculation so a later reviewer can distinguish evidence, interpretation, approval and action.

## Handover, Reuse and Follow-Up

Close the record so another person can reproduce the work, understand the limits and continue document uncertainty and limits without relying on memory. Keep the smallest useful evidence package, protect sensitive information and give the final file a clear version.

| Handover field      | Record                             |
|---------------------|------------------------------------|
| Current conclusion  | _____                              |
| Evidence location   | Folder, record or reference: _____ |
| Open question       | _____                              |
| Decision condition  | _____                              |
| Next action / owner | _____                              |
| Review date         | _____                              |
| Retention / privacy | Keep until _____; access: _____    |

## Reuse checklist

| Reuse gate  | Question                                                            | Status       |
|-------------|---------------------------------------------------------------------|--------------|
| Definitions | Are the meanings of desired outcome and current baseline unchanged? | Yes / update |
| Sources     | Are rates, limits, data and guidance still current?                 | Yes / update |
| Context     | Does the new case share the same scope and conditions?              | Yes / update |
| Method      | Is the chosen tool or method still applicable?                      | Yes / update |
| Review      | Has the right qualified or authorised person checked it?            | Yes / update |
| Version     | Has the reused record received a new date and identifier?           | Yes / update |

## 30-day learning loop

- Compare the expected result with what actually happened.
- Record whether an assumption, input definition or method caused avoidable rework.
- Improve one shared field or check; do not add process that supports no decision.
- Archive the final decision, not every unnecessary draft.

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