Observe the core workflow

01 / Functional fit

For each item, record the evidence observed. Mark pass, concern or not tested; a checked box alone is not evidence.

Area	Question to demonstrate	Review status
Workflow	Can the intended user complete the agreed sequence from its correct starting state?	Pass / Concern / Not tested
Inputs	Do required fields, references, choices and date rules match the proposed use?	Pass / Concern / Not tested
Calculated values	Can a reviewer explain each computed result from the stored inputs?	Pass / Concern / Not tested
State changes	Do actions lead to the expected saved states without duplicate effects?	Pass / Concern / Not tested
Boundary checks	Are stale versions, invalid references and repeated actions handled clearly?	Pass / Concern / Not tested
Documents	Do exported documents accurately represent the source record and scope?	Pass / Concern / Not tested

Review notes

Reviewer: _____ Date: _____

Inspect the operating context

02 / Operational fit

For each item, record the evidence observed. Mark pass, concern or not tested; a checked box alone is not evidence.

Area	Question to demonstrate	Review status
Workspace isolation	Can one organisation be prevented from reading or linking another organisation's records?	Pass / Concern / Not tested
Roles	Do read-only, staff, manager and owner permissions match the actual responsibilities?	Pass / Concern / Not tested
Devices	Are the necessary tasks usable with the intended mobile, tablet and desktop views?	Pass / Concern / Not tested
Reports	Are measures, dates and source records clear enough to interpret correctly?	Pass / Concern / Not tested
Integrations	Have the actual provider accounts, credentials, callbacks and verification paths been evaluated?	Pass / Concern / Not tested
Recovery	Is there an agreed, tested backup and restoration process for the intended deployment?	Pass / Concern / Not tested

Review notes

Reviewer: _____ Date: _____

Record evidence and open work

03 / Acceptance record

For each item, record the evidence observed. Mark pass, concern or not tested; a checked box alone is not evidence.

Area	Question to demonstrate	Review status
Evidence	Are observations retained with the tested version, scenario and reviewer?	Pass / Concern / Not tested
Known limits	Are unfinished features and sector-specific requirements explicitly recorded?	Pass / Concern / Not tested
Support	Are real support channels, responsibilities and arrangements agreed?	Pass / Concern / Not tested
Data handling	Are access, retention and sensitive-data responsibilities defined for the actual use?	Pass / Concern / Not tested
Commercial scope	Are prices, source rights and service commitments separately approved?	Pass / Concern / Not tested
Next decision	Is the next step clear, with an owner and an observable acceptance condition?	Pass / Concern / Not tested

Review notes

Reviewer: _____ Date: _____