HOUSEHOLD DOCUMENT REVIEW DESK

Build the baseline

Write facts and sources before filling the main table. Do not guess at missing information.

Project or subject

Date or period

STEP 1 Use document categories instead of account or identity numbers.

STEP 2 Record who checked the current source and the next review date.

STEP 3 Note the update to confirm rather than copying sensitive document contents.

STEP 4 Which fact or document still needs checking?

HOUSEHOLD DOCUMENT REVIEW DESK

Keep a dated record

Record what actually occurred. Reprint this page whenever you need more rows.

Reference period

Review date

RECORD OR REVIEW DATE	DOCUMENT CATEGORY	PERSON RESPONSIBLE	REVIEW PROGRESS	SOURCE LOCATION AND UPDATE QUESTION

Outstanding question or record to confirm

HOUSEHOLD DOCUMENT REVIEW DESK

Make the next step happen

Each useful action has an owner, a date and a result that can be checked.

ACTION 1 Use document categories instead of account or identity numbers.

Concrete next action	Owner / due

ACTION 2 Record who checked the current source and the next review date.

Concrete next action	Owner / due

ACTION 3 Note the update to confirm rather than copying sensitive document contents.

Concrete next action	Owner / due

IMPORTANT CONTEXT

This local checklist does not validate a document, monitor expiry dates or send reminders. Store sensitive originals securely elsewhere.

- [ ] Source checked
- [ ] Next action assigned