

Every Letter Right: quality checklist

The checks every exercise goes through, and who signs each stage. A completed copy is part of the record you keep.

1. Scoping

- Exercise, versions, issue date and delivery method agreed in writing
- Data owner named; source data and its date agreed
- Data processing agreement signed; working location agreed (your systems or devices)
- Cut-off date for changes agreed

2. Data

- Row count matches the headcount for the exercise
- No duplicate employee references; every row has the fields each version needs
- Every row maps to exactly one version under the rules table
- Exceptions (leavers, starters, long-term absence) listed and confirmed

3. Build and test

- Built and tested on dummy data only
- Every merge field present and formatted (dates, money, names)
- One filled-in sample per version, read as the employee would read it
- Samples signed off by the named approver; any later change re-approved

4. Pre-issue checks on live data

- Letters made equals rows in scope
- Spot check of at least 10% (minimum 20) against the source rows
- Highest, lowest and every exception checked by hand
- File names and recipient addresses match the employee on every letter

5. Issue

- Sent from your mailbox, or saved to each manager's folder, on the agreed date
- Bounces and failures re-sent and logged the same day

6. Close

- Reconciliation log of what went to whom and when, handed over
- Working files deleted on the agreed date, confirmed in writing

Sign-off

Stage	Signed by	Date
Scoping		
Samples approved		
Pre-issue checks		
Issue and reconciliation		