

Accepting a provider transition

A provider has prepared a transition pack and proposed a handover date. The receiving organisation has staff available. Open queries and continuing responsibilities still need owners, and the basis for acceptance needs agreement.

Illustrative industry scenario. Fictional example created to explain a decision; not a client case study.

The decision

The authorised receiving decision-maker is asked to agree the acceptance basis and then assess the evidence. The illustrative record below remains proposed. It does not record an accepted transfer or authorise an activity.

A practical next step

If criteria or authority are unclear, agree what is transferring, who can accept it and what evidence they need. If both are agreed, review the pack against them and record the acceptance decision, its scope and any agreed conditions. Allocate interim ownership of unresolved items in either case.

Illustrative acceptance record

Status: acceptance not yet recorded. Scope: responsibilities in the agreed transfer list. Evidence to review: the transfer list, relevant working instructions, readiness evidence and reconciled open queries. Record the receiving decision-maker, the decision and its date. For each open item, record an owner, interim arrangement and review point.

Limits and review

A complete folder and available staff are inputs to the assessment. They do not establish that the receiving organisation has accepted the responsibilities. If a material criterion remains unmet, record the gap and escalate the decision within the agreed authority.

Responsibility and review

The proposed owner is the authorised receiving decision-maker, supported by both teams. First, agree criteria and reconcile the evidence against them. Review before the planned transfer; revisit the date or scope if an unresolved item prevents acceptance. No continuity or readiness outcome is claimed.

Use this brief to agree the next decision with the responsible team.

Discuss your requirements: enquiries@iaeconsults.co.uk

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