

Template Guide

What is an Acceptance Form?

An Acceptance Form is a document which is completed to request formal acceptance of a project deliverable by the customer.

Acceptance Forms typically include:

- *Summarized project information*
- *Details of the deliverable, requester and request date*
- *A list of the acceptance criteria and standards required to be met*
- *A summary of the results of the acceptance testing undertaken to determine whether or not the deliverable meets the criteria and standards specified*
- *A section allowing the customer to approve the deliverable*

When to use an Acceptance Form

Acceptance Forms are used during the “Execution” phase of the project (i.e. the phase in which the products are constructed) as part of the Acceptance Management Process. Although one Acceptance Form may be completed per deliverable, an Acceptance Form may also be completed for a set of related deliverables for which customer acceptance is sought. The Acceptance Form is typically completed by the Project Manager and formally distributed to the customer for review and sign-off. Only those deliverables which have been completed and are believed to meet the requirements of the customer should be put forward for acceptance. As part of the Acceptance Management Process, if it is determined that a deliverable does not meet the requirements of the customer, further actions may be requested to be undertaken to improve the quality of the deliverable for future acceptance.

How to use this template

This document provides a guide on the topics usually included in an Acceptance Form. Sections may be added, removed or redefined at your leisure to meet your particular business circumstance. Example tables, diagrams and charts have been added (where suitable) to provide further guidance on how to complete each relevant section.

Acceptance Form

PROJECT DETAILS	
Project Name:	[Enter the name of the project which produced the deliverable]
Project Manager:	[Enter the name of the project manager responsible for producing the deliverable]
ACCEPTANCE DETAILS	
Acceptance ID:	[Enter a Unique identifier for this acceptance request]
Requested By:	[Enter the Name of the person who is requesting deliverable acceptance]
Date Requested:	[Enter the date on which this form is submitted to the customer for approval]
Description: [Add a brief description of the deliverable for which customer acceptance is being requested]	
ACCEPTANCE CRITERIA	
Criteria: [List the criteria against which the deliverable has been measured]	Standards: [List the standards against which the deliverable has been measured.]

EXCERPT ONLY