

**STANDARD OPERATING PROCEDURE**

# Change Order Workflow & Tracker Maintenance

*StartupFinancialPlan.ai — Base44 Build*

**Owner:** Matt Evans | **Created:** 2026-05-03 | **Version:** 1.16

## Contents

1. Purpose .....	3
2. Project Context (60-second briefing) .....	3
2.1 The Three Execution Points.....	3
2.2 Single Point of Execution.....	4
3. Backlog Tracker Structure .....	4
3.1 Backlog tab columns .....	5
3.2 Action_Items tab columns .....	5
4. Materiality Threshold — When to Use the CO Process vs. Minor Log .....	6
5. The Change Order Lifecycle .....	6
Phase 1 — CONCEIVE .....	7
Phase 2 — ADD TO TRACKER .....	7
Phase 3 — SUBMIT.....	7
Phase 4 — EXECUTE .....	7
Phase 5 — VERIFY & CLOSE.....	7
6. Worked Case Study: CO-021.01 .....	8
6.1 The action item itself .....	8
6.2 How it flows through the three execution points.....	8
6.3 Phase 1 — CONCEIVE (Admin) .....	8
6.4 Phase 2 — ADD TO TRACKER (Claude Cowork).....	9
6.5 Phase 3 — SUBMIT (Admin).....	9
6.6 Phase 4 — EXECUTE (Super Agent) .....	9
6.7 Phase 5 — VERIFY & CLOSE (Admin → Cowork) .....	10
6.8 How the row evolves.....	10
6.9 Why this example is representative.....	10
7. Urgency Taxonomy (Action_Items).....	11
8. Priority Taxonomy (Backlog) .....	11
9. Status Taxonomy.....	11
10. Onboarding a New Claude Cowork Session .....	11
11. Conventions Going Forward .....	13

12. Companion Files (in /\_Backlog/) ..... 13

13. Revision History ..... 13

## 1. Purpose

This SOP documents how Change Orders flow through the StartupFinancialPlan.ai project, how the Backlog Tracker is structured and maintained, and how Claude Cowork sessions should onboard themselves so the process stays consistent across every conversation.

Read this once at the start of any Cowork session about this project. The workflow is stable; the project state is what changes.

## 2. Project Context (60-second briefing)

- **What this project is:** A financial-forecasting app suite (Apps 1–7 plus App 8 reporting/Excel) being built on the base44.app no-code platform under the brand StartupFinancialPlan.ai.
- **Project root:** C:\Users\mevan\OneDrive\Documents\Claude Project\

Key folders:

- 01\_Charter\_and\_Inventory — Project Charter v2, Function Points Register v2, App Inventory v3, Glossary
- 02\_Current\_State\_Discovery through 08\_Reference\_Library — phase-specific docs
- **09\_Admin\_Submissions/** — every change order Admin submits to Super Agent (file prefix = Admin's CO #)
- **09\_Admin\_Submissions/\_Backlog/** — the tracker (Backlog\_Tracker.xlsx) and companion files

### 2.1 The Three Execution Points

Every action in this project is performed by exactly one of three actors (or a documented combination). The Owner column on Backlog and Action\_Items uses these names verbatim. Hand-offs between actors are the moments of risk — they are also the only places Status changes.

Actor	Role	Examples (does)	Boundary (does NOT)
Admin Matt	Owner / decision-maker / verifier	Conceive COs; make scope, pricing, and architecture decisions; complete KYC and Form 1583; verify SA work against Acceptance Criteria; sign off on closeouts; maintain the source-of-truth submission docs in 09_Admin_Submissions/.	Maintain the tracker by hand (handed to Cowork); write base44 code (handed to SA).
Claude Cowork	Process steward / tracker maintenance / advisory analysis	Add new COs to Backlog with correct ID and priority; break each CO into Action_Items with Urgency tags and predecessors; draft documents (SOPs, memos, prompts); log Closeout entries; index source docs; advise on sequencing and dependencies.	Write base44 code (handed to SA); make business or scope decisions (handed to Admin); change CO IDs once assigned.

Actor	Role	Examples (does)	Boundary (does NOT)
Super Agent (SA on base44)	App builder	Implement code changes inside base44; configure platform settings (visibility, custom domain, MFA); deploy features; generate UI components; populate apps; provide change-log responses to Admin.	Make scope or architecture decisions (handed to Admin); maintain the tracker (handed to Cowork).

**Composite ownership.** Many action items show two actors (e.g., "Admin + Super Agent"). Read this as: the Admin directs/decides and the Super Agent executes. The first-listed actor holds final accountability for the row.

**Why no "Cowork-only" rows on Action\_Items.** Cowork's work is meta — it is performed on the tracker itself, not on the app under build. Cowork-owned work is described in Phases 2 and 5 of §5 below; it is not enumerated as line items in the Action\_Items punch list.

## 2.2 Single Point of Execution

**Business rule (locked-in 2026-05-03):** Super\_Agent\_Prompts.docx is the SINGLE POINT OF EXECUTION for the PM Admin on this project. When Admin needs to submit work to Super Agent, Admin opens that document, finds the relevant CO-### block, and copies the PROMPT TO COPY box. There is no other place.

**Continuity rule for every Claude Cowork session:** if the work involves a prompt for Super Agent — drafting, revising, rescoping, adding a new CO — the work lands in Super\_Agent\_Prompts.docx. Edit the relevant CO block in place. Do NOT append addenda or create separate prompt files. One current prompt block per CO, period.

**Audit trail of changes** lives in this SOP's revision history (§13) and the tracker's Closeout\_Log — not in Super\_Agent\_Prompts.docx. Old prompt text is replaced when superseded; nothing is preserved alongside the current version inside the prompt library.

**This rule exists** because Admin needs ONE place to look for marching orders. Past addendum-stacking buried current prompts under historical versions, breaking continuity. Single point of execution = no ambiguity about where to find the current prompt.

## 3. Backlog Tracker Structure

The tracker (Backlog\_Tracker.xlsx) has seven sheets, each serving a specific purpose:

Sheet	Name	Purpose
1	README	Workbook orientation. Update only when the process itself changes.
2	Backlog	Executive summary — one row per Change Order. Sorted by Priority (P0 → P3) then by CO ID. Color-coded by priority.
3	Action_Items	Punch list — one row per discrete step within a CO. Use this for daily review. Linked to Backlog by CO #.

Sheet	Name	Purpose
4	Closeout_Log	Audit trail of every CO submission, response, verification, and decision.
5	Minor_Changes_Log	For tweaks too small for the CO process — copy edits, library additions, icon swaps.
6	Document_Index	Maps every source doc in 09_Admin_Submissions to its parent CO ID.
7	Priority_Rationale	Definition of P0/P1/P2/P3 tiers and which COs are in each.

### 3.1 Backlog tab columns

Col	Header	Purpose
A	ID	Tracker CO # (CO-001 through CO-NNN). Stays stable forever; never renumber.
B	Matt CO #	Admin's submission number — file prefix from 09_Admin_Submissions.
C	Priority	P0 / P1 / P2 / P3. Drives row ordering and fill color.
D	Status	Pending / Submitted / In Review / Awaiting Verification / Closed / Rework / Blocked / Deferred.
E	Title	Short descriptive title.
F	Dimension / Area	Which app, dimension, or area this affects.
G	Source Document(s)	Filename(s) from 09_Admin_Submissions.
H	Action Required	1–2 sentence summary plus pointer to Action_Items range.
I	Owner	One of: Admin / Claude Cowork / Super Agent (or a combination).
J	Acceptance Criteria	What "done" looks like at the CO level.
K	Dependencies	Other CO IDs that must close first.
L	Date Submitted	Date the prompt was sent to Super Agent.
M	Date Closed	Date verified done.
N	Notes	Context, cross-references, judgment calls.

### 3.2 Action\_Items tab columns

Col	Header	Purpose
A	Action ID	CO-NNN.NN (flat) or CO-NNN.A1 (sectioned). Stays stable.
B	CO #	Parent tracker ID.

Col	Header	Purpose
C	Matt CO #	Admin's submission #.
D	Seq	Numeric ordering within the CO.
E	Action	The specific task in plain language.
F	Urgency	IMMEDIATE / 24-HR / PRE-BETA / STANDARD / DECISION (color-coded).
G	Type	Lockdown / Cleanup / Build / Verify / Setup / Legal / Content / Compliance / Audit Trail / Process / Decision / Gate.
H	Owner	One of: Admin / Claude Cowork / Super Agent (or a combination such as "Admin + Super Agent" — Admin directs, SA executes).
I	Status	Pending (yellow) / In Progress / Done / Blocked / N/A.
J	Due Date	Hard deadline if any.
K	Predecessor	Action IDs that must close first.
L	Verification	How to confirm done — the test or proof of completion.
M	Notes	Caveats, references, cross-CO links.

## 4. Materiality Threshold — When to Use the CO Process vs. Minor Log

Use `Minor_Changes_Log` (no CO process) when ALL of these are true:

- Reversible in under 5 minutes
- No logic or data model change
- No calculation impact
- No new dependency
- Single-file scope

**Examples:** *add a doc to the library, swap a logo, fix a typo, reorder a list, copy edit.*

Use the `CO-###` process when ANY of these are true:

- Touches a formula or calculation
- Changes a data field
- Adds or removes a feature or screen
- Alters a workflow
- Affects more than one app
- Hard to revert

## 5. The Change Order Lifecycle

Every Change Order flows through five phases. Each phase has exactly one accountable actor (named under the phase heading). Treat this as the master process.

## Phase 1 — CONCEIVE

*Performed by: **Admin** — identifies the need, drafts the source document.*

Admin identifies a needed change and writes it up as a docx in 09\_Admin\_Submissions/. Filename starts with the next sequential number Admin assigns (e.g., 15\_Some\_Description.docx). For multi-part submissions, Admin may produce companion docs (15\_Companion\_Detail.docx).

## Phase 2 — ADD TO TRACKER

*Performed by: **Claude Cowork** — reads the new source doc and lays it into the tracker in one batched update.*

*When a new CO file appears in 09\_Admin\_Submissions/, Cowork updates everything in one pass: Backlog row + Action\_Items breakdown with Urgency tags + Document\_Index + Closeout\_Log Submitted entry + Priority\_Rationale (if P0/P1) + Super\_Agent\_Prompts.docx paste-ready prompt block + Backlog re-sort.*

**Admin does nothing in Phase 2.** Just drop the source doc and Cowork handles the rest.

## Phase 3 — SUBMIT

*Performed by: **Admin** — copies the prompt to Super Agent and updates Status.*

Admin copies the prompt for the new CO from Super\_Agent\_Prompts.docx, pastes it into base44 Super Agent, and updates the Backlog row's Status to "Submitted" and Date Submitted.

## Phase 4 — EXECUTE

*Performed by: **Super Agent** — builds, with Admin available to answer scope questions.*

Super Agent works on the build inside base44. Admin remains available to clarify scope or answer narrow questions but does not implement or override SA decisions in this phase.

## Phase 5 — VERIFY & CLOSE

*Performed by: **Admin drops the file; Claude Cowork** — does the rest.*

1. **Admin:** save SA's response to /\_Backlog/SA\_Responses/CO-XXX\_response\_YYYY-MM-DD.md (full response, not a summary), then tell Cowork "SA responded on CO-XXX."
2. **Cowork:** read the file, distill into Closeout\_Log Summary, compare SA's claims against each Action\_Item's Verification column, mark Status = Done where SA's response satisfies the criteria, flag any rows that require an external check Admin must do (e.g., "SA says noindex is in <head> — you need to actually open the page and confirm"), update Backlog Status to Closed (or Rework with new sub-Action\_Items for gaps).
3. **Admin:** spot-check only the rows Cowork flagged. Confirm or correct.

## 6. Worked Case Study: CO-021.01

This section walks through one Action\_Item end-to-end so the abstract process becomes concrete. The example is **CO-021.01** — the first IMMEDIATE step in the Pre-MVP Compliance Lockdown — chosen because it touches all three execution points within a single working day, has a visible verification step, and represents the highest-urgency tier in the Urgency taxonomy.

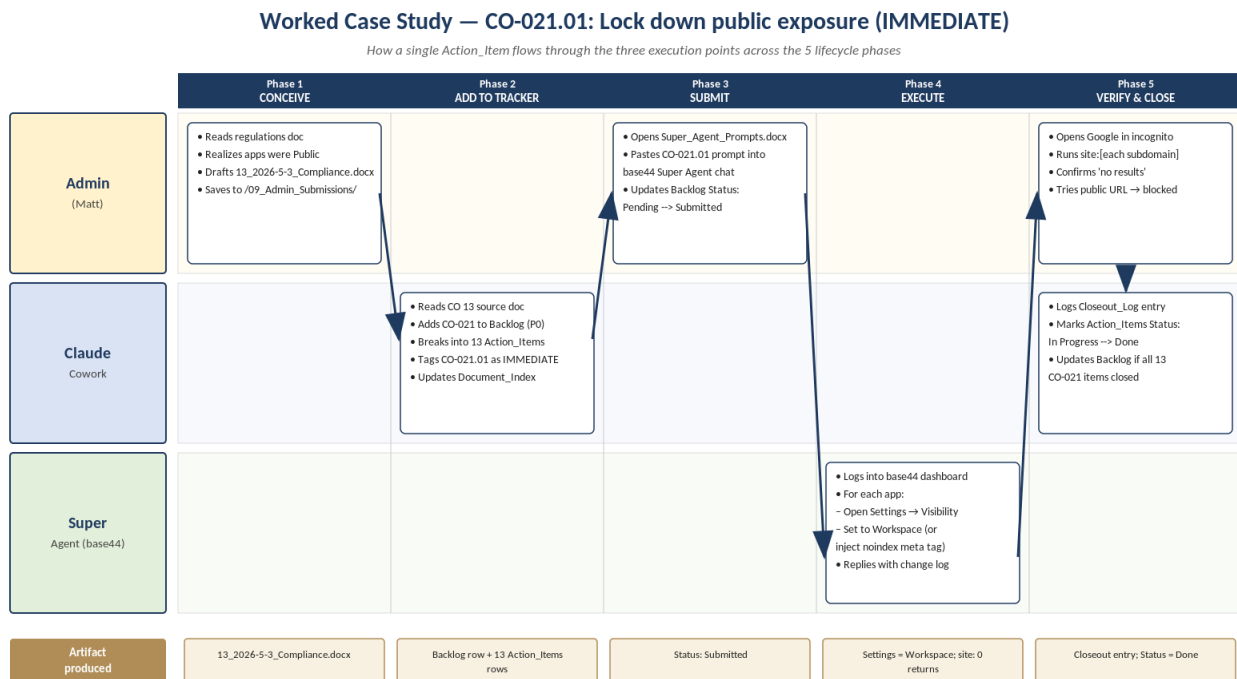
### 6.1 The action item itself

Pulled directly from the Action\_Items punch list:

- **Action ID:** CO-021.01
- **Action:** Set every published app to noindex meta tag (preferred) OR switch visibility to Workspace immediately — stops any further crawler exposure.
- **Urgency:** IMMEDIATE
- **Owner:** Admin
- **Verification:** site:[each subdomain] in Google returns "no results" AND robots.txt or page <head> shows noindex directive (or app no longer publicly reachable).

### 6.2 How it flows through the three execution points

The diagram below shows what each actor does at each phase, the sequence of hand-offs, and the artifact each phase produces. Read it left-to-right; arrows are hand-offs between actors.



### 6.3 Phase 1 — CONCEIVE (Admin)

Admin reads the regulations document, recognizes that the published apps were left at Visibility = Public with login disabled, and writes up the issue plus a recommended path in 13\_2026-5-3\_Compliance.docx.

Admin saves the file to /09\_Admin\_Submissions/. No one else does anything in this phase. The artifact: one source document.

### 6.4 Phase 2 — ADD TO TRACKER (Claude Cowork)

Cowork reads the source document end-to-end and identifies the umbrella change order plus the discrete action items. Cowork then:

- Adds row CO-021 to Backlog with Priority P0 and a 1–2 sentence summary in Action Required.
- Adds 13 rows to Action\_Items (CO-021.01 through .13). The first row is tagged Urgency = IMMEDIATE, Owner = Admin, with the verification text above.
- Indexes the source document in Document\_Index.
- Updates Priority\_Rationale to mention CO-021 in the P0 list.
- Re-sorts Backlog by Priority then CO ID so CO-021 sits with the other P0 blockers.

**Output of this phase:** one Backlog row + 13 Action\_Items rows. The IMMEDIATE row jumps out at the top of the punch list because of its red Urgency cell.

### 6.5 Phase 3 — SUBMIT (Admin)

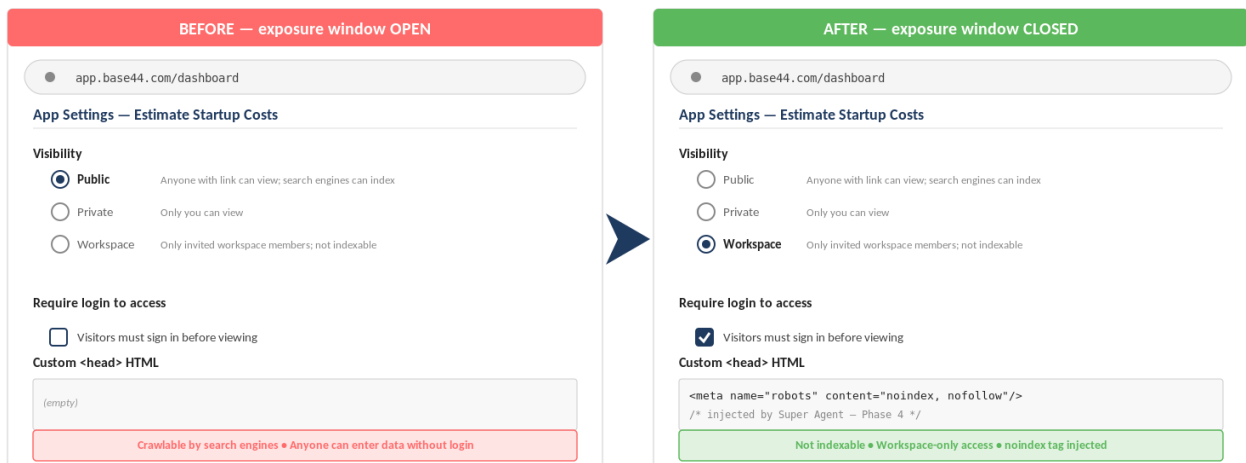
Admin opens Super\_Agent\_Prompts.docx, copies the prompt block for CO-021.01, pastes it into the base44 Super Agent chat, and updates Backlog Status from Pending → Submitted with today's date in Date Submitted. Cowork separately appends a "Submitted to Super Agent" row to Closeout\_Log.

### 6.6 Phase 4 — EXECUTE (Super Agent)

Super Agent receives the prompt and acts inside base44. The actual change is small but high-impact: switch Visibility from Public to Workspace on every published app, OR — if the platform supports custom <head> injection — add a noindex meta tag instead. The "before" and "after" of that settings panel:

#### Phase 4 — What the Super Agent does inside base44

*Visibility setting on each app: Public -> Workspace (or inject noindex meta tag)*

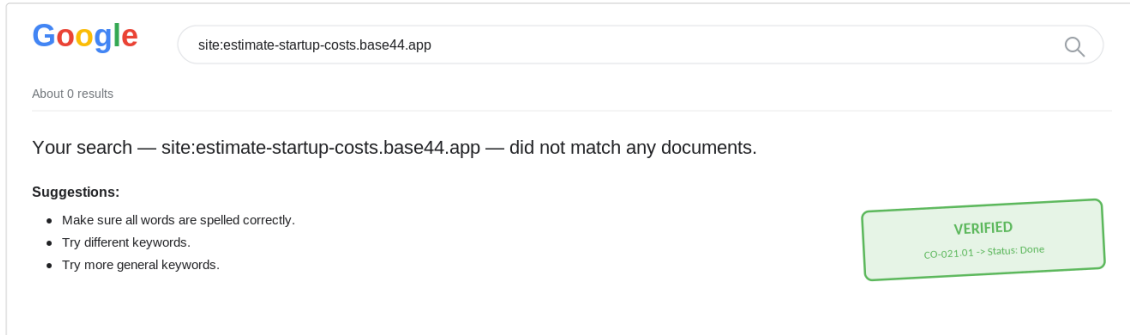


SA replies in chat with a brief change log noting which apps were modified and which approach was used (Workspace lockdown vs. noindex tag). Action\_Items.Status moves Pending → In Progress when SA acknowledges receipt, then In Progress → ready-for-verification when SA reports completion.

## 6.7 Phase 5 — VERIFY & CLOSE (Admin → Cowork)

Admin verifies the change against the row's Verification column. The site: check is the proof:

Phase 5 — Admin verification: Google site: search confirms zero results



When Google returns "did not match any documents" for site:[each subdomain] AND the public URL no longer loads for an unauthenticated visitor, the verification passes. Admin sets Action\_Items Status = Done. Cowork then adds a Closeout\_Log entry capturing the SA response summary, the verification result, and any follow-on actions.

## 6.8 How the row evolves

The same Action\_Items row is read three times during the lifecycle. Only Status (col I) and Notes (col M) change between readings — everything else is set once at Phase 2 and stays stable.

How the CO-021.01 Action\_Items row evolves through the lifecycle

Same row, three snapshots — only Status (col I) and Notes change

Snapshot 1 — After Phase 2 (Cowork added the row)					
Action ID	Action	Urgency	Owner	Status	Notes
CO-021.01	Set every published app to noindex meta tag (preferred) OR switch visibility to Workspace immediately	IMMEDIATE	Admin	Pending	BLOCKER for re-opening. site: confirmed unindexed. Will fall back to Workspace if base44 cannot inject custom meta tag.

Snapshot 2 — After Phase 3 (Admin submitted to SA)					
Action ID	Action	Urgency	Owner	Status	Notes
CO-021.01	Set every published app to noindex meta tag (preferred) OR switch visibility to Workspace immediately	IMMEDIATE	Admin	In Progress	Submitted to SA at 09:14 on 2026-05-03. SA confirmed receipt; expected execution within 15 min.

Snapshot 3 — After Phase 5 (Admin verified, Cowork closed)					
Action ID	Action	Urgency	Owner	Status	Notes
CO-021.01	Set every published app to noindex meta tag (preferred) OR switch visibility to Workspace immediately	IMMEDIATE	Admin	Done	site: returns 0 on every subdomain (verified 09:32). All 7 apps now Workspace visibility. Closeout_Log entry #4.

## 6.9 Why this example is representative

- **Hand-offs are the risk points.** CO-021.01 has four of them — Admin → Cowork, Cowork → Admin, Admin → SA, SA → Admin. Each is a moment Status changes; each is a moment something can fall through the cracks if the actor at the receiving end isn't paying attention.
- **Verification is concrete.** A Google site: search either returns 0 results or it doesn't. There is no fuzzy "kinda done." Every Action\_Item should aim for that level of verification clarity.

- **Urgency drove the sequence.** Because this row was tagged IMMEDIATE, it sat at the top of the punch list and was worked first. The other 12 CO-021 items waited their turn. Without the Urgency tag, the time-critical noindex change would have been buried in a 13-step paragraph.

## 7. Urgency Taxonomy (Action\_Items)

Urgency	Color	Meaning
IMMEDIATE	Red	Do today. Time-sensitive risk if delayed (e.g., live exposure window).
24-HR	Orange	Within 24 hours. Compliance work, audit-trail memos, data purges.
PRE-BETA	Yellow	Must close before any external user / beta tester sees the app.
STANDARD	Light Gray	Sequenced but not time-pressured.
DECISION	Blue	Requires explicit choice with cascading impact.

**Application rule:** Apply Urgency by impact, not by personal preference. Lockdown actions, audit memos, and gating events are usually IMMEDIATE or 24-HR. Long build work is PRE-BETA or STANDARD. Anything that locks in irreversible architecture (like Stripe integration choice) is DECISION.

## 8. Priority Taxonomy (Backlog)

Priority	Color	Meaning
P0	Orange	BLOCKER. Must clear before anything else moves.
P1	Yellow	Phase 1 BUILD — required to ship MVP.
P2	Light Green	Phase 1 EXECUTION — Admin-owned, sequenced after build.
P3	Light Blue	Phase 2 / Dimension 1 — defer until MVP traction.

## 9. Status Taxonomy

**Backlog statuses:**

Pending → Submitted → In Review → Awaiting Verification → Closed (or Rework / Blocked / Deferred)

**Action\_Items statuses:**

Pending (yellow background) → In Progress → Done (or Blocked / N/A)

*Always update Status before changing Date columns.*

## 10. Onboarding a New Claude Cowork Session

Paste the following at the start of any new Claude Cowork conversation about this project:

I'm working on the StartupFinancialPlan.ai base44 build. The Standard Operating Procedure for change-order tracking is at:

**C:\Users\mevan\OneDrive\Documents\Claude Project\09\_Admin\_Submissions\\_Backlog\SOP\_Change\_Order\_Workflow.docx**

Please:

1. Request access to C:\Users\mevan\OneDrive\Documents\Claude Project\ if you don't have it.
2. Read the SOP first.
3. Read the Backlog tab and Action\_Items tab in Backlog\_Tracker.xlsx (same folder) to see current state.
4. Then ask me what I need.

**CURRENT FOCUS (2026-05-03) – three-phase sequence:**

**PHASE 1 – Functional + foundation + design (NOW):**

>>> CO-001 IMMEDIATE – Lock down Apps 1-7 + relocate Beta Sign-Up to Hub nav links <<<

Apps: remove overlay + Public->Workspace + republish (atomic per app).

Hub: app nav links trigger beta sign-up form instead of routing to Workspace-locked apps.

Net: apps locked, Hub serves as marketing funnel via .ai domain redirect, paid testers bypass via Workspace invite.

Open Super\_Agent\_Prompts.docx and go to the CO-001 block (current at its natural position).

CO-024 (App 1/suite RLS rules audit + fix) – security; can run in parallel.

CO-010 (PLAN B per CO 17) – codify App 6 design + pilot on App 5; defer Apps 1-4.

CO-025 (Hub Build Map) – tiered visual eras (legacy / modern / premium); embraces app-design layering.

CO-023 BLOCKED on CO-010.02 (App 5 pilot). App 7 doesn't exist yet; build it in the

CO-010 closes – avoids rebuilding it later. (CO-003 deferred to P3, superseded by CO-023.)

Other functional COs (CO-002 DIO cost model, CO-004 scenarios, CO-005 doc corrections)

can run alongside if SA bandwidth allows.

**PHASE 2 – Pre-beta compliance push (NEXT):**

CO-021 remaining items (.04 session-TTL, .05 banner, .06 dummy data, .10 feedback widget, .12 verify base44 claims), all of CO-022 (custom domain,

Trust Center, full legal stack, Stripe scaffolding). Re-elevate STANDARD -> PRE-BETA when this phase opens.

**PHASE 3 – Beta (TARGET):**

CO-013 (45-row functional test), CO-014 (recruit + run + track), CO-021.13 (re-open gate).

Custom domain switch (CO-021.11 / CO-022.A1) is part of Phase 2; held until launch prep.

**Why this works:** it forces every Cowork session to read the same starting context before doing anything. No more re-onboarding from scratch. The SOP plus the live tracker state is everything Claude needs to be useful immediately.

## 11. Conventions Going Forward

- Backlog rows stay sorted by Priority (P0 → P3) then by CO ID.
- New Action\_Items get inserted into their CO block in sequence — not appended to the bottom.
- **CO IDs are immutable.** Never renumber existing CO-### items, even when re-sorting rows. They are referenced from Closeout\_Log, Document\_Index, and Priority\_Rationale.
- **Owner column uses three role names only:** Admin / Claude Cowork / Super Agent (or a combination). No personal names in the Owner cells.
- **The xlsx workbook contains zero formulas.** Do NOT run formula recalc on it; doing so has produced corruption in this OneDrive folder.
- Always work on a /tmp copy first. Validate the saved file as a sound zip (PK\x05\x06 EOCD signature present) before copying it back to the OneDrive path.
- Save the prior version as a backup (e.g., /tmp/Backlog\_Tracker.bak.xlsx) before any structural change.

## 12. Companion Files (in /\_Backlog/)

- **Backlog\_Tracker.xlsx** — the live tracker.
- **SOP\_Change\_Order\_Workflow.docx** — this document.
- **Super\_Agent\_Prompts.docx** — OUTBOUND. Copy/paste-ready prompts for every CO-###. Cowork appends a new prompt block at Phase 2; Admin pastes from here at Phase 3.
- **SA\_Responses/** — INBOUND folder. One file per CO (CO-XXX\_response\_YYYY-MM-DD.docx). Admin saves SA replies here at Phase 5 capture step; Cowork reads, distills, and references in the Closeout\_Log.
- **Monday\_Action\_Plan.docx** — one-page kickoff for Monday.

## 13. Revision History

Version	Date	Changes
1.0	2026-05-03	Initial SOP. Documents 7-sheet tracker, 5-phase CO lifecycle, Urgency/Priority/Status taxonomies, onboarding script, conventions.
1.1	2026-05-03	Added §2.1 "The Three Execution Points" with formal role definitions (Admin / Claude Cowork / Super Agent) and explicit boundaries. Added "Performed by:" line under each lifecycle phase in §5. Harmonized Action_Items Owner column to use the three role names.
1.2	2026-05-03	Added §6 "Worked Case Study: CO-021.01" — an end-to-end walk-through of the first IMMEDIATE action item across all five lifecycle phases, with embedded swimlane diagram, base44 settings before/after mockup, Google search verification mockup, and Action_Items row state-evolution table. Renumbered later sections (Urgency now §7, Priority §8, Status §9, Onboarding §10, Conventions §11, Companion Files §12, Revision History §13).

Version	Date	Changes
1.3	2026-05-03	Extended §10 onboarding paste-block with a CURRENT FOCUS section so a new Cowork session knows the active strategic direction without re-deriving it from the tracker. Captures: active CO submissions, urgency deferrals, custom-domain hold. Update this block when direction shifts.
1.4	2026-05-03	Refined CURRENT FOCUS into a three-phase sequence: Phase 1 (functional + foundation, including CO-001 beta gate bypass and CO-024 RLS audit which are foundational, not just compliance), Phase 2 (pre-beta compliance push, batched), Phase 3 (beta). Custom domain switch correctly grouped with Phase 2. Action: re-elevate STANDARD-tagged CO-021 items to PRE-BETA when Phase 2 opens.
1.5	2026-05-03	Elevated CO-001 to IMMEDIATE in §10 CURRENT FOCUS Phase 1. Broken into Action_Items: CO-001.01 (SA implements admin bypass — IMMEDIATE) and CO-001.02 (Admin verifies across 7 apps — 24-HR). Backlog Status moved Pending -> Submitted (escalate) since SA had it but produced no resolution per Closeout_Log #1.
1.6	2026-05-03	Codified prompt-drafting in §5 Phase 2 as a new step 6 (re-sort moved to step 7): Cowork must append a paste-ready prompt block to Super_Agent_Prompts.docx for every new CO. Admin pastes from there at Phase 3 without rewriting. Updated §12 Companion Files description to reflect this responsibility split.
1.7	2026-05-03	Created /_Backlog/SA_Responses/ folder as the inbound counterpart to Super_Agent_Prompts.docx. Restructured §5 Phase 5 into a 5-step numbered sequence: Capture (Admin saves SA response to file) -> Hand off -> Distill (Cowork into Closeout_Log) -> Walk verification (Admin against each Action_Item) -> Close or rework. Added the SA_Responses folder + README to §12 Companion Files. Closes the inbound/outbound symmetry: prompts go OUT via Super_Agent_Prompts.docx; responses come IN via SA_Responses/.
1.8	2026-05-03	COMPRESSION pass per Admin direction ("compress steps to as little as possible"). Phase 2 dropped from 7 numbered Cowork steps to 1 batched-update sentence + Admin-does-nothing note. Phase 5 dropped from 5 steps to 3 actions: Admin drops file + pings; Cowork distills, analyzes verification against Action_Items, closes in tracker, flags items needing external check; Admin spot-checks only flagged rows. Net effect: Admin Phase 2 = zero steps; Admin Phase 5 = drop file + spot-check (was: capture + hand off + walk every row).
1.9	2026-05-03	Format standardization per Admin direction ("do not post .md files"). All SA_Responses naming references switched from .md to .docx as the primary format. SA_Responses/README replaced with README.docx. Standing rule: Cowork never writes .md, .txt, or other developer-format

Version	Date	Changes
		files for Admin-facing artifacts. Standard Office formats only — .docx, .xlsx, .pptx, .pdf.
1.10	2026-05-03	DESIGN PIVOT: Phase 1 in CURRENT FOCUS expanded to "Functional + foundation + design." CO-010 (UI Modernization) elevated and rescope — original "Apps 2-6" scope was wrong (Admin clarified Apps 1-5 are old, App 6 is modern reference). New scope: codify App 6 design system, apply to Apps 1-5, set standard for App 7. CO-003 and CO-023 moved to Blocked because both touch App 7 which doesn't exist; building it in old style would create rework. CO-010 prompt block added to Super_Agent_Prompts.docx as ADDENDUM 2.
1.11	2026-05-03	CO-003 deferred to P3 (Status: "Deferred (superseded by CO-023)"). CO-023 owner_distribution fix-category covers the use case at the level small-business users actually need; detailed equity-allocation pass-through is a distraction. CO-003 stays on the backlog (visible at P3) with a documented revival condition: revive if multi-investor users request specific % allocation reports during beta. Priority_Rationale updated. CO-023 now the only item blocked on CO-010.
1.12	2026-05-03	CO-001 RESCOPED from "Bypass" to "Remove" the beta sign-up gate. Strategic decision: shift to paid-recruit beta model (hand-invited testers lined up 30 days ahead) instead of passive sign-up capture through apps. Gate captured zero real leads (CO-021.02 purge confirmed only Admin's own record). Removing is platform-native, far simpler than bypassing. Action_Items rescope accordingly. Super_Agent_Prompts.docx ADDENDUM 3 added with the new prompt; prior CO-001 + ADDENDUM 1 prompts marked superseded but retained for historical reference. CURRENT FOCUS Phase 1 lead line updated.
1.13	2026-05-03	CO-001 SCOPE EXPANDED: gate removal alone would have left apps Public (the very compliance issue that prompted CO-021). Atomic operation now required per app: remove overlay + change Visibility from Public to Workspace + republish. Done together so there is zero exposure window. Defense-in-depth: noindex (CO-021.01 done) + Workspace (new) + future MVP banner + future 24-hr TTL. Action_Items.01 rewritten as atomic 3-step per app; .02 verification expanded to 3 checks (overlay gone, logged-out denied, Admin can still access). Super_Agent_Prompts.docx ADDENDUM 4 supersedes ADDENDUM 3.
1.14	2026-05-03	CO-001 SCOPE EXPANDED AGAIN: Hub home page (marketing funnel via startupfinancialplan.ai redirect) needs the beta sign-up form preserved when apps lock. Solution: relocate the gate component from apps to Hub — Hub app nav links now trigger the form instead of routing to Workspace-locked apps. Apps still locked; Hub still Public; paid testers bypass via Workspace invite; random Hub visitors fill out

Version	Date	Changes
		form. Action_Items.03 (SA Hub change — IMMEDIATE) and .04 (Admin verifies Hub — 24-HR) added. ADDENDUM 5 supersedes ADDENDUM 4. CURRENT FOCUS Phase 1 lead updated.
1.15	2026-05-03	Locked in business rule: Super_Agent_Prompts.docx is the SINGLE POINT OF EXECUTION for the PM Admin. New §2.2 codifies the continuity rule for Cowork: every prompt change (draft, revise, rescope, new CO) lands in that doc, edited in place — no addenda, no separate prompt files. Old text is replaced when superseded; audit trail of changes lives in this SOP and Closeout_Log. Triggered by accumulating addenda burying current CO-001 content under 5 historical versions. Library rebuilt clean to v2.0; addenda eliminated.
1.16	2026-05-03	CO 17 executed: CO-010 rescoped to PLAN B (pilot on App 5 not App 1, defer Apps 1-4 propagation, embrace layered look as intentional). NEW CO-025 added for Hub Build Map redesign — three tiered visual eras (legacy 2003 / modern 2015 / premium 2025) reframes app design inconsistency as deliberate progression. CO-023 unblock condition narrowed to CO-010.02 (App 5 pilot complete) instead of full Apps 1-5 modernization. Super_Agent_Prompts.docx v2.1: CO-010 block REPLACED IN PLACE with Plan B (single-point-of-execution rule honored — no addendum); CO-025 block added at proper position. CURRENT FOCUS Phase 1 updated.