

CLICKOAI LAW FIRM GUIDE 02 OF 63

# Better Legal Documents in Microsoft Word

Six controls for structure, review, accessibility and finalisation.

**Use it when**

lawyers lose time repairing formatting, tracking edits or finding the released version

**Boundary**

This covers document working practices, not legal drafting quality or Microsoft licensing advice.

**Built for independent law firms in England and Wales**

Original ClickoAI edition | Version 1 | 18 August 2026 | [clickoai.com/law-firm-guides](https://clickoai.com/law-firm-guides)

# 1. Frame the decision

Use Word features consistently so structure, review status and accessibility do not depend on one person's memory.

**Specific focus**

Use styles, tracked review, accessibility checks, fields, version control and a release check consistently.

**Questions to answer**

- For this guide: Use styles, tracked review, accessibility checks, fields, version control and a release check consistently.
- Are styles used consistently?
- Is Track Changes used for review?
- Are unresolved changes visible?
- Does the file pass the Accessibility Checker?

**Avoid**

- manual paragraph formatting
- hiding markup instead of resolving it
- parallel uncontrolled versions

## 2. Control sheet

Treat a blank evidence field as a reason to pause, not a reason to guess. Record sources and owners before changing the workflow.

| Area      | Evidence to collect            | Pass condition                   |
|-----------|--------------------------------|----------------------------------|
| Structure | Styles, headings and numbering | Template is followed             |
| Review    | Changes and comments           | Unresolved work is visible       |
| Content   | Fields and cross-references    | Checks have owners               |
| Access    | Accessibility Checker          | Issues are corrected or recorded |
| Finalise  | Metadata, filename and PDF     | Released copy is identified      |

|                    |                                                                                                                   |
|--------------------|-------------------------------------------------------------------------------------------------------------------|
| <b>Fail closed</b> | If an input, owner or approval is missing, record the gap and keep the affected step outside the proposed change. |
|--------------------|-------------------------------------------------------------------------------------------------------------------|

### 3. Working record

Complete this page with counts, dates and named sources. Do not include client names, matter names, contract text or privileged material.

| Field                | Evidence or answer                                                                                          |
|----------------------|-------------------------------------------------------------------------------------------------------------|
| Guide focus          | Use styles, tracked review, accessibility checks, fields, version control and a release check consistently. |
| Template             |                                                                                                             |
| Review mode          |                                                                                                             |
| Open changes         |                                                                                                             |
| Accessibility result |                                                                                                             |
| Finaliser            |                                                                                                             |
| Released filename    |                                                                                                             |

#### Evidence quality check

- The source is named and dated.
- An estimate is labelled as an estimate.
- The owner can reproduce the measure.
- The same method can be used after a change.

## 4. Decision record

Select the outcome that the evidence supports. A stop or no-change decision is valid.

- Stop: a required source, owner or approval is missing.
- Fix: repair the underlying route before adding technology or cost.
- Test: run one bounded change with a baseline and review date.
- Proceed: adopt only the option supported by the recorded evidence.

| Decision field        | Record |
|-----------------------|--------|
| Chosen outcome        |        |
| Reason and evidence   |        |
| Owner and approvers   |        |
| Review or expiry date |        |

### Primary sources

[Microsoft Support: Basic tasks in Word](#)

[Microsoft Support: Track changes in Word](#)

[Microsoft Support: Make Word documents accessible](#)

[SRA: Effective supervision](#)

### Source status

Links checked 18 August 2026. Confirm the current version and obtain appropriate professional advice before relying on regulated, contractual, privacy, security, insurance, financial or wellbeing conclusions.