48 free workplace records

Crewbright | Individual fillable sheets | Updated 11 November 2026

Open in a compatible PDF reader. Complete with your verified local arrangements, save a copy and check your entries before printing. Follow each record link for current instructions. Store completed records securely.

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Food delivery and exception log

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Date / supplier / delivery reference	
Product and quantity	
Condition / date observations	
Required check / result / local limit	
Accepted / held / rejected	
Action and decision-maker	
Storage completed at	

Before use: Confirm the order and product. Inspect packaging and dates. Apply local temperature and acceptance checks. Escalate substitutions or defects. Store accepted goods and close the record.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Kitchen cleaning schedule

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Area / equipment	
Method and approved product	
Dilution / contact time / rinse instructions	
Frequency / trigger	
Owner	
Completed at / by	
Exception and action	
Checker	

Before use: List each surface or item. Confirm the approved method and product. Record product-specific instructions. Assign timing, owner and checker. Record exceptions and follow-up.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Ingredient-change and allergen handover log

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Date / time	
Old product and replacement	
Affected dishes	
Evidence checked	
Record / label updates	
Briefed staff and time	
Authorised by	

Before use: Identify the product and affected dishes. Check current ingredient information. Review preparation and relevant labels. Update the working record. Brief all affected colleagues and confirm receipt.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Role-to-training comparison sheet

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Role and tasks	
Existing learning evidence	
Knowledge course selected	
Local demonstration required	
Supervisor / date	
Review trigger	

Before use: List each role's tasks. Match tasks to learning outcomes. Check the type of certificate and assessment. Assign a workplace briefing and supervisor. Record the next review trigger.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Booking-information review sheet

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Booking process / field	
Purpose	
Minimum information needed	
Who needs access	
Approved storage location	
Retention rule reference	
Incident contact / review owner	

Before use: Identify the purpose of each field. Use the approved booking system. Write concise operational notes. Check recipients and access. Escalate incidents promptly.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Supplier-change verification record

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Date / message reference	
Unexpected request	
Independent contact method	
Verification owner / outcome	
Any interaction and time	
Incident contact informed	
Final action	

Before use: Pause the requested change. Keep the message available for the authorised team. Verify using an independent trusted route. Use the normal payment approval process. Report any interaction promptly.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Complaint and service-recovery log

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Date / service / reference	
Guest concern	
Facts checked	
Action agreed / authorised by	
Update promised / delivered	
Outcome	
Follow-up owner	

Before use: Listen and summarise. Check the relevant facts. Agree an authorised next action. Give the promised update. Record outcome and recurring issues.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Venue arrival-information worksheet

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Arrival and entrance	
Ordering / payment steps	
Typical noise / lighting	
Quieter options checked	
Communication options	
Contact for questions	
Last checked / owner	

Before use: Explain arrival and ordering. Describe the environment factually. Ask about useful communication options. Give clear next steps and time. Handover agreed arrangements.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Accessible-booking handover sheet

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Booking reference	
Question or requested arrangement	
Verified venue information	
Action / responsible colleague	
Confirmation sent / channel	
Shift handover	
Change or follow-up	

Before use: Check the venue facts. Ask what would help. Confirm available arrangements. Record the minimum operational information. Handover and update changes.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Event volunteer induction record

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Event / date / role	
Location / map reference	
Supervisor and backup	
Communication method	
Emergency / welfare procedure reference	
Understanding checked	
Follow-up / attendance	

Before use: Confirm the role and boundaries. Show the location and routes. Test the communication method. Identify support and escalation contacts. Check understanding and record attendance.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Incident and near-miss record

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Date / time / location	
Observed facts	
Information supplied by others	
Immediate action	
Reported to / time	
Follow-up owner / due point	
Review and closure	

Before use: State time and location. Record observations and attributed statements. List immediate actions. Identify who received the report. Assign follow-up and record closure.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Lone-working contact plan

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Venue / date / tasks	
Worker	
Monitoring person and backup	
Contact method / planned times	
Missed-contact response reference	
Contact received / action	
Shift closure confirmed	

Before use: Confirm the assessed tasks and staffing. Name worker and monitoring contact. Check primary and backup communications. Brief the missed-contact response. Confirm the end-of-shift handover.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Delivery-handling briefing sheet

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Task / delivery item	
Route and destination	
Obstructions / task changes	
Agreed method / aid	
Person providing support	
Demonstration / briefing	
Issue escalated and outcome	

Before use: Check the route and destination. Consider reducing or avoiding the handling. Confirm suitable aids and authorised help. Explain when to pause and escalate. Record observed difficulties for review.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Cleaning-chemical briefing record

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Task / product	
Assessment reference	
Controls and equipment	
Demonstration date / supervisor	
Learner explanation checked	
Further support needed	
Change / review trigger	

Before use: Identify the task and product. Locate the assessment and instructions. Demonstrate the agreed controls. Ask the learner to explain the method. Record follow-up and change triggers.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Safeguarding adults in hospitality: spotting a concern

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Concern	
adult's stated wishes	
immediate safety	
designated lead	
information shared	
agreed next step	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Safeguarding children at family events: recognise and report

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Observation or exact words	
date and time	
immediate danger	
person informed	
report channel	
follow-up route	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Lost-child procedures at events: briefing front-line staff

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Report time	
reporting location	
designated lead	
approved communication route	
authorised handover record	
follow-up	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Spiking concerns in a venue: a staff welfare briefing

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Time raised	
exact location	
observed condition	
help requested	
welfare lead	
factual handover	
authorised evidence arrangements	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Sexual harassment awareness in hospitality: examples for staff briefings

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Reporting routes	
alternative contact	
immediate support	
restricted record location	
next action	
agreed follow-up	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Handling an angry customer: a hospitality conversation example

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Guest concern	
options within authority	
help signal	
safe withdrawal route	
handover recipient	
factual incident record	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Age verification for pub staff in England and Wales

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Time	
till or bar	
reason for refusal	
ID issue without unnecessary personal data	
staff member	
supervisor support	
outcome	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Preventing slips during a busy café service

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Exact location	
material or hazard	
temporary protection	
clean-up owner	
equipment defect	
reopening check	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Fire safety induction for restaurant staff: the first-shift checklist

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Work area	
alarm-raising method	
evacuation routes	
assembly point	
assistance arrangements	
responsible contact	
briefing date	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Role-based staff training matrix

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Role / staff identifier	
Task	
Required learning or instruction	
Course evidence	
Local briefing / demonstration	
Supervisor / outstanding action	
Review trigger / next check	

Before use: List roles and real tasks. Define the evidence needed. Record learning and local demonstration separately. Assign support and an owner. Review when the work changes.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Food-waste observation and action log

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / event	
Owner / date / version	
Date / service	
Item / waste category	
Amount and unit	
Reason	
Covers or other activity measure	
Action / owner	
Review result	

Before use: Choose the waste stream and unit. Record amount and reason consistently. Add a relevant activity measure. Choose one action and owner. Compare a similar later service.

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Calling emergency help at a large venue: information to have ready

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Exact address/location	
access point	
caller contact	
help called/time	
first aider	
responder guide	
handover	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Modern slavery awareness for hotel and event teams

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Observation	
location/time	
immediate danger	
safe reporting route	
person informed	
restricted record reference	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Stress awareness for hospitality shift teams

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Work pressure described	
practical change	
support route	
action owner	
review date	
privacy arrangement	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

A DSE checklist for the hospitality office

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
User/task	
chair and desk setup	
screen position	
reach/glare	
task variation	
discomfort reported	
action owner	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Outdoor event staff welfare: preparing for changing weather

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Forecast/check time	
deployment	
water/rest/shelter	
reporting contact	
change authority	
staff updates	
welfare action	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Noise awareness for bar and event staff

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Work area	
noise control	
required protection	
fitting information	
communication method	
replacement/reporting contact	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

HACCP basics for a small catering team

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Product/process	
hazard	
control	
check/limit	
actual result	
corrective action	
authorisation	
review trigger	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Pest signs in a restaurant: what staff should report

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Exact place	
sign observed	
stock affected	
immediate protection	
manager notified	
follow-up reference	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

First-shift customer service skills for café staff

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Request	
checked availability	
promise made	
responsible colleague	
handover time	
change communicated	
completion	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Crowd awareness for front-line event staff

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Location	
time	
direction of movement	
obstruction	
distress observed	
message recipient	
instruction received	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Protective security awareness for front-line venue staff

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Location/time	
factual observation	
reporting contact	
emergency instructions	
staff role	
exercise feedback	
review owner	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Protecting skin when cleaning in hospitality

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Task/substance	
selected protection	
fit/condition check	
removal/storage	
replacement	
skin concern reported	
follow-up	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Using a ladder at work: what to check before starting

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Task	
ground-level alternative	
selected equipment	
user instruction	
pre-use condition	
area protection	
authorisation	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Damaged electrical equipment: checks for venue staff

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Equipment identity	
location	
visible defect	
stopped-use action	
person informed	
repair reference	
release authority	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Risk assessment basics using a hospitality task

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Task and people affected	
hazard	
existing control	
further action	
owner	
deadline	
review trigger	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Fire warden awareness: preparing for a venue briefing

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Assigned zone	
tasks and limits	
communication	
reporting point	
cover	
drill observation	
corrective action	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

First-aid appointed person: organising the workplace arrangements

Complete with the actual workplace arrangements. Read the accompanying guide, agree the local procedure and identify who will check the record.

Venue / role / date	
Appointed person/cover	
equipment location	
checks and replenishment	
emergency contacts	
staff notice	
needs-assessment owner	

Follow-up

Action	Owner	Due / trigger	Completed

Keep completed records with the appropriate access restrictions. Save your entries before closing.

Read the accompanying guide online

Warehouse first-shift induction checklist

Complete with your supervisor using the current local plan, instructions and authorisation. Open in a compatible PDF reader, save a copy and check your entries before printing.

Site / role / date	
Supervisor / current plan version	
Pedestrian route and crossing	
Blocked route fallback	
Stock-hold location	
Reporting contact	
Task authorisation	
Supervisor observation	

Follow-up / owner / review time

Use the current approved arrangements. Store completed records securely.

Read the accompanying guide online

https://crewbright.co.uk/blog/warehouse-first-shift-induction-checklist/

Festival gate radio report record

Complete with your supervisor using the current local plan, instructions and authorisation. Open in a compatible PDF reader, save a copy and check your entries before printing.

Site / role / date	
Supervisor / current plan version	
Time	
Call sign	
Exact map reference	
Observed change	
Accessible route affected	
Action requested	
Acknowledgement	
Next update	

Follow-up / owner / review time

Use the current approved arrangements. Store completed records securely.

Read the accompanying guide online

https://crewbright.co.uk/blog/festival-gate-radio-call-template/

Mixed crew shift briefing template

Complete with your supervisor using the current local plan, instructions and authorisation. Open in a compatible PDF reader, save a copy and check your entries before printing.

Site / role / date	
Supervisor / current plan version	
Critical post	
Named worker	
Competence checked by	
Buddy	
Teach-back prompt	
Break cover	
Unresolved gap and owner	

Follow-up / owner / review time

Use the current approved arrangements. Store completed records securely.

Read the accompanying guide online

https://crewbright.co.uk/blog/mixed-crew-shift-briefing-template/

Festival steward patrol record

Complete with your supervisor using the current local plan, instructions and authorisation. Open in a compatible PDF reader, save a copy and check your entries before printing.

Site / role / date

Supervisor / current plan version

Post and time

Direction of travel

Landmark

Change observed

Impact on another route

Person informed

Instruction

Next check

Follow-up / owner / review time

Use the current approved arrangements. Store completed records securely.

Read the accompanying guide online

https://crewbright.co.uk/blog/festival-steward-patrol-record/

Festival zone opening and handover checklist

Complete with your supervisor using the current local plan, instructions and authorisation. Open in a compatible PDF reader, save a copy and check your entries before printing.

Site / role / date	
Supervisor / current plan version	
Zone	
Critical posts covered	
Accessible route checked	
Emergency access checked	
Radio check	
Open restriction	
Decision owner	
Review time	

Follow-up / owner / review time

Use the current approved arrangements. Store completed records securely.

Read the accompanying guide online

https://crewbright.co.uk/blog/festival-zone-readiness-handover/

Event budget change log template

Complete with your supervisor using the current local plan, instructions and authorisation. Open in a compatible PDF reader, save a copy and check your entries before printing.

Site / role / date	
Supervisor / current plan version	
Change reference	
Existing commitments	
Forecast remaining spend	
Proposed change	
Impact on access and timing	
Decision owner	
Approved version	
Recipients	

Follow-up / owner / review time

Use the current approved arrangements. Store completed records securely.

Read the accompanying guide online

https://crewbright.co.uk/blog/event-budget-change-log/