

Vendor-document checklist

Use for your own vendor files. Keep sensitive records in an appropriately secured system, not a general inquiry form.

Vendor / property or portfolio:

File owner / review date:

☐ **Business and service information**

Legal name, contact, service area, trades, site contacts and signed scope.

☐ **Applicable license evidence**

Issuing agency, credential number, status, expiration and date checked.

☐ **Insurance documentation**

Record coverage evidence, policy dates and insurer/agent verification contact.

☐ **Commercial and payment records**

Contract, agreed rates, payment terms and any required tax forms held securely.

☐ **Site requirements**

Access instructions, work hours, safety expectations and incident contact.

☐ **Individual screening, if applicable**

Use an authorized specialist process. Record scope and date; restrict report access.

☐ **Review and renewal follow-up**

Identify missing items, next review date, renewal reminders and responsible person.

Missing item / owner / due date:
