

Crew lead job handoff checklist

Use this checklist for the actual service, product, site and jurisdiction. Leave missing evidence unresolved until the responsible person confirms it. Record the decision and its source before proceeding.

Business job date and responsible person

- ☐ Identify job, customer contact, crew, scope and approved estimate revision.
- ☐ Attach measurement, layout, product and supplier batch records.
- ☐ Confirm quantities, equipment, spare parts and access arrangements.
- ☐ Discuss hazard controls, weather decision, traffic and emergency procedures.
- ☐ Assign quality checks, hold points and who may approve a change.
- ☐ Provide customer schedule, closure and payment instructions.
- ☐ Require daily hours, material use, photos and issue records.
- ☐ Review closeout, rework, customer acceptance and the next action.

Unresolved items evidence and next action

Decision owner and follow up date

Sources and record notes

Author NPMCA. Worksheet version 1.0; guide record as of 2026-10-11. Technical limits and prices must come from the exact current product instructions, official rule or dated written quote.

IRS worker classification: <https://www.irs.gov/businesses/small-businesses-self-employed/independent-contractor-self-employed-or-employee>

USCIS Form I-9: <https://www.uscis.gov/i-9>

Guide: <https://www.npmca.org/start/hiring-crew>