WORKSHEET 2.13

Documented Information

Subchapter 2.13 · case in the book: Tallinn

If a client asked tomorrow for six pieces of evidence from your system, would you hand over six sheets, or three binders in which the client must search? And do you know which participant lists from last autumn are still in your house, with whom, and for what purpose?

This worksheet turns the tools of the subchapter into a form you can fill in. The texts come from the book; the empty columns are for your own property. Adapt it before use: an unadapted checklist is exactly what the book warns against.

Practical application: what to do in your property

Step (from the book)	Done?	What we found / owner
One page instead of 212: A register of documented information, eighteen lines long, now states what the standard requires, what the hotel needs in addition, where it lives, who owns it and how long it stays. Forty of the forty-seven forms were struck, F-17 among them.		
Evidence where it arises: Saar's leftovers spreadsheet moved to the shared drive with a header giving title, period and owner. Lessons are noted in the banquet order after each event.		
One policy: Tamm signed a single dated version, and marketing replaced the other two on the website and in the brochure.		
Lists with an end date: The lists came off the pinboard that afternoon; Saar examined that week whether anyone unauthorised had seen them and recorded the result. Lists now live only in the reservation software, visible to banqueting, kitchen and reception, and the banquet order has a new field: deletion date, three months after the event. The archive box was destroyed after review; the invoices were kept.		

These steps are the book's method, not requirements of ISO 20121. Evidence can take whatever form suits the property; a separate document is needed only where an applicable requirement, or the property's own system, makes it necessary.

Verification Pact: what is believed, tested against the standard

What is commonly believed	What actually holds	Our position
A system to ISO 20121 needs a manual	No. No manual is required; documentation proportionate to size (introduction); formalising processes is optional (note to 4.4)	
Every procedure must be written down	No. A procedure need not be documented (3.26); A.17 gives guidance to document only where absence endangers implementation	

What is commonly believed	What actually holds	Our position
Every document needs a signature	Only partially true. A signature is expressly required only on the policy (5.2); otherwise appropriate review and approval (7.5.2)	
Everything is kept for ever	No. Retention and disposal must be regulated (7.5.3)	
Supplier papers are not part of the system	No. Documents of external origin are controlled as well (7.5.3)	
Data protection is not a topic of the standard	No. Digital responsibility, including data protection, among the issues (6.1.2 a, note); information protected (7.5.3)	

Common mistakes: a self-check

Mistake (from the book)	Present here?	Action / owner
Buying a template package and filing it: the binders describe another house.		
Presenting instructions when evidence is asked for.		
Letting several versions of a document circulate, so that none applies.		
Keeping the best figure on one person's computer.		
Keeping participant lists because they exist.		
Filing supplier certificates once and forgetting their expiry.		
Keeping invoices and guest health data in the same list.		
Signing every page when only the policy requires a signature.		

Operative synthesis

- **Is there a register showing what documented information the system has and where it lives?: Information that cannot be found does not exist for a client**
- **Is there exactly one valid, dated and signed policy?: Clause 5.2 requires it, and several versions mean none applies**
- **Does evidence stay where it arises, not in copies alongside?: Copies drift and double the work**
- **Are forms nobody fills in struck out?: Empty forms show a client the system is not used**
- **Is it settled who sees participant lists and when they are deleted?: Health information is a risk for as long as it stays in the house**
- **Could we send a client the requested evidence within a day?: Clause 7.5.3 requires information to be available where needed**
- **Act on immediately. Take personal data off pinboards and out of open folders, establish one valid policy, and move private spreadsheets to a shared, labelled location.**

- **Plan for. Draw up a one-page register of what the standard requires and what the hotel needs, strike unused forms, set access rules and deletion dates, and separate billing data from guest data.**
- **Monitor going forward. Review the register once a year, replace expired supplier papers, and test whether a client's request could be answered within a day.**

Action plan for our property

Action	Owner	Due	How we will know it worked

Source: Francesco Dore, The Helm and the Lens, Volume 8a «The Helm», subchapter 2.13. Edizioni Effedore, 2026. Clause references are paraphrased; this sheet does not reproduce the text of ISO 20121. It is not legal advice: the law that applies is that of the place where the property operates.