

Reservation Information Checklist

Collect information because it supports a defined reservation, safety, payment, eligibility, communication or operational need - not simply because an old form included it.

Privacy reminder: Collect only information with a defined operational, safety, eligibility, payment, communication or legal purpose, and protect it under the approved privacy and retention process.

Customer and participants

- Contracting renter's legal name and reliable contact information.
- Operator, participant and guardian roles where relevant.
- Emergency contact information when approved for the activity.
- Eligibility or education status required by the operation and jurisdiction.
- Privacy notice and reason for each sensitive field collected.

Rental and inventory

- Reservation number, location, product, date, arrival, departure and return times.
- Assigned unit or inventory pool, capacity and permitted use area.
- Included equipment, selected add-ons and quantities.
- Delivery, pickup, property access or staging details when applicable.
- Substitution, extension, reschedule and cancellation history.

Requirements and agreements

- Waiver and policy version, signer, date, time and completion status.
- Safety briefing, instruction and acknowledgement status.
- Age, license, education or authorization checks approved for the activity.
- Missing requirement flags visible before check-in.
- Document retention and retrieval expectations.

Payments and communication

- Price, taxes, fees, discounts, payments, refunds, credits and balance.

- Deposit, authorization or damage-security method described accurately.
- Confirmation, reminder, weather, return and support messages.
- Customer choices and staff notes for exceptions.
- Final completion, reconciliation and follow-up owner.

Field review matrix

Field or status	Why it is needed	Who may access it	Retention / deletion rule

Created August 4, 2026. This checklist is an information-planning tool, not legal advice or a universal waiver template.