

Health and safety basics: a checklist for SMEs



Running a small business comes with plenty of moving parts, and health and safety is one area that's too important to let slide.

This checklist gives you clear, practical actions to help keep your people safe, supported and confident in your approach to health and safety. You may already have some of this in place – that's great. Use this list to double-check what you're doing, refresh anything that's slipped, and spot gaps you might not have noticed yet.

While this checklist is designed primarily for **office-based and hybrid working SMEs**, you'll also find **industry-specific prompts** to help you think about additional risks if your people work in different environments.

General safety & legal compliance

- ☐ Create a health and safety policy, review it regularly and store it somewhere safe and easily accessible for employees.
- ☐ Complete suitable and sufficient risk assessments for all workplaces, sites and activities, and review them regularly, especially when something changes.
- ☐ Name one clear owner or "competent person" responsible for health and safety overall, and make sure there's clear day-to-day responsibility at each site or location.
- ☐ Put appropriate first aid arrangements in place based on your risks, size and working patterns.
- ☐ Make sure key health and safety documents are up to date and easy to find.
- ☐ Display a health and safety law poster at each working location or provide each worker with a leaflet.
- ☐ Put a process in place to consult with all your employees on health and safety matters.
- ☐ Be ready to show evidence of what you've done for audits, insurers or client requests.

Fire safety

- ☐ Carry out a fire risk assessment for each site and location and keep it under review, looking at hazards, who might be at risk, escape routes, and how a fire would be detected and alarm raised.
- ☐ Put appropriate fire detection and alarm systems in place based on your risk assessment(s).
- ☐ Provide suitable fire-fighting equipment where needed and arrange professional servicing where appropriate.
- ☐ Clearly mark fire exits and keep escape routes clear, well-lit and easy to use.
- ☐ Create a simple fire evacuation plan for each site and practice it twice per year.
- ☐ Keep records of fire risk assessments, checks, servicing and drills in one accessible place.
- ☐ Appoint a sufficient number of fire wardens to carry out evacuation procedures and support fire safety arrangements.

Equipment & workplace safety

- ☐ Keep walkways, work areas and exits clear and safe to use.
- ☐ Check that work equipment is safe, well maintained and suitable for the job at each site or location. This includes desks, tools, machinery or vehicles.
- ☐ Appoint a sufficient number of first aiders and provide suitable first aid supplies and facilities for your workplace needs.
- ☐ Complete DSE (display screen equipment) assessments for anyone who regularly works on a screen, including office, home and hybrid workers.
- ☐ Review DSE assessments when roles, locations or equipment change.
- ☐ Provide practical guidance or training where manual handling is part of the role.
- ☐ Put a clear process in place for reporting faulty equipment, hazards or near misses.
- ☐ Carry out electrical safety checks and PAT testing where needed, based on risk and how equipment is used.
- ☐ Keep maintenance records, risk assessments and inspection logs for all sites in one central place.

Wellbeing & mental health

- ☐ Include stress and mental health risks in your health and safety risk assessments.
- ☐ Name a clear point of contact for wellbeing concerns, such as a manager or HR.
- ☐ Encourage regular breaks and manageable workloads, especially during busy or high-pressure periods.
- ☐ Maintain safe, clean and comfortable working environments across all sites and working locations.
- ☐ Respond to concerns raised and make reasonable adjustments where you can.
- ☐ Keep a simple record of agreed actions or adjustments, so follow-ups don't get missed.

Training & awareness

- ☐ Provide clear health and safety training when people start, tailored to the risks in their role and relevant to the sites and environments they work in.
- ☐ Explain how to recognise and log risks, near misses, incidents and accidents, and why reporting matters. Educate everyone on which accidents and incidents need to be reported to the Health and Safety Executive ([HSE](#)).
- ☐ Provide refresher training on a regular basis and when things change, such as new equipment, locations or ways of working.
- ☐ Make policies, procedures and guidance easy to find, read and understand.
- ☐ Record health and safety training completed by each individual, including dates and confirmation they've completed and understood it.
- ☐ Store training records, policies, risk assessments and incident logs for all sites in one central place.

Industry-specific considerations

The checklist above covers the basics for office-based and hybrid SMEs. Depending on how and where your people work, you may also need to consider additional risks.

- ☐ **Construction:** Working at height, site safety, contractor management, competence records.
- ☐ **Education:** Safeguarding, infection control, supervision, incident reporting.
- ☐ **Field service and trade:** Lone working, driving safety, working at height, off-site incident reporting.
- ☐ **Healthcare and care:** Infection control, manual handling of people, hazardous waste, food hygiene where relevant.
- ☐ **Manufacturing and assembly:** Machinery safety, manual handling, noise or vibration, maintenance records.
- ☐ **Not for profit:** Safeguarding, lone working, emotional wellbeing, volunteer safety.
- ☐ **Retail and hospitality:** Slips and spills, fire safety in public areas, manual handling, food hygiene where relevant.

Your risk assessments should reflect how your organisation actually operates, not just what's written in a policy.

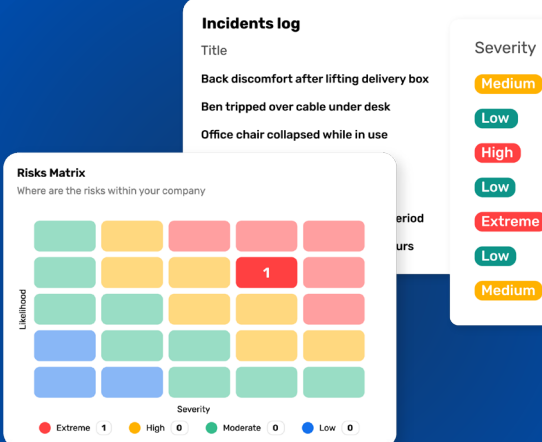
Final tip

Keeping your team safe is an ongoing effort, and you don't have to do it alone. Using simple software to store and track your health and safety tasks, records and reminders can take the pressure off and give you peace of mind.



Check out Breathe Health & Safety

*NOTE: This checklist has been created in partnership with health and safety experts at [Omny Group](#) – an HR and employment law consultancy and one of our trusted [Breathe partners](#). It is intended as a **helpful guide**, not a replacement for legal advice or professional health and safety support. Every business is different, so it's important to make sure your approach reflects how and where your people actually work, and to seek competent advice where needed. **Need legal advice or health and safety support? [Get in touch with Omny Group today.](#)***



Incidents log

Title	Severity
Back discomfort after lifting delivery box	Medium
Ben tripped over cable under desk	Low
Office chair collapsed while in use	High
	Low
	Extreme
	Low
	Medium

Risks Matrix
Where are the risks within your company

	Extreme	High	Moderate	Low
Likelihood				

Severity: Extreme 1, High 0, Moderate 0, Low 0