

Menu Allergen Matrix Checklist

Use this 60-point checklist to verify menu items, approved recipes, ingredients, intentional allergens, cross-contact risk, printed and digital information, kitchen execution, customer communication, change control, and final release.

BUSINESS / LOCATION

REVIEW DATE

MATRIX OWNER

APPROVER

1. Matrix scope, regulated allergen list, responsibilities, and document control

1

MENU MATRIX

Confirm the business, location group, menu range, service channels, review date, matrix owner, approver, and products included in the review.

NAME

DATE / TIME

APPROVAL

i

Execution tip: Define the applicable allergen list, menu scope, ownership, version rules, and critical escalation process before reviewing menu items.

2

CRITICAL

MENU MATRIX

Maintain a controlled register of allergens that must be declared or managed in every applicable market, customer contract, and sales channel.

RECORD

CURRENT

OWNER

EVIDENCE

ACTION

i

Execution tip: Define the applicable allergen list, menu scope, ownership, version rules, and critical escalation process before reviewing menu items.

3

MENU MATRIX

Assign accountable owners for ingredient specifications, recipes, matrix updates, menu publication, POS data, employee communication, and incident response.

☐ Compliant

☐ Partial

☐ Non-compliant

☐ N/A

i

Execution tip: Define the applicable allergen list, menu scope, ownership, version rules, and critical escalation process before reviewing menu items.

4

MENU MATRIX

Define the approved matrix format, allergen categories, symbols, source references, version numbering, release status, and record-retention requirements.

MENU ITEM

RECIPE

ALLERGEN

SOURCE

STATUS

i

Execution tip: Define the applicable allergen list, menu scope, ownership, version rules, and critical escalation process before reviewing menu items.

5

CRITICAL

MENU MATRIX

Identify critical failures that require an immediate menu hold, item withdrawal, order stop, escalation, and documented release decision.

SAFE

NEEDS ACTION

CRITICAL

LIVE PHOTO Add

i

Execution tip: Define the applicable allergen list, menu scope, ownership, version rules, and critical escalation process before reviewing menu items.

6

MENU MATRIX

Review previous complaints, near misses, wrong menu statements, supplier changes, recipe mismatches, outdated channels, and overdue corrective actions.

RECORD

CURRENT

OWNER

EVIDENCE

ACTION

i

Execution tip: Define the applicable allergen list, menu scope, ownership, version rules, and critical escalation process before reviewing menu items.

2. Menu item, recipe, ingredient, supplier, and sub-ingredient data capture

7

MENU MATRIX

List every active menu item, size, flavour, variation, modifier, topping, sauce, garnish, side, beverage, bundle, and limited-time offer in scope.

MENU ITEM	RECIPE	ALLERGEN	SOURCE	STATUS
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i

Execution tip: Build each matrix row from current approved recipes and supplier specifications, not from memory, assumptions, or old menu copies.

8

CRITICAL

MENU MATRIX

Link each menu item to its approved recipe, recipe revision, portion, preparation method, production site, and responsible recipe owner.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
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i

Execution tip: Build each matrix row from current approved recipes and supplier specifications, not from memory, assumptions, or old menu copies.

9

CRITICAL

MENU MATRIX

Verify every ingredient and processing aid has a current approved specification with complete allergen composition and sub-ingredient information.

☐ Compliant

☐ Partial

☐ Non-compliant

☐ N/A

i

Execution tip: Build each matrix row from current approved recipes and supplier specifications, not from memory, assumptions, or old menu copies.

10

MENU MATRIX

Record the specific ingredient or recipe component that creates each intentional allergen declaration for the menu item.

MENU ITEM	RECIPE	ALLERGEN	SOURCE	STATUS
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i

Execution tip: Build each matrix row from current approved recipes and supplier specifications, not from memory, assumptions, or old menu copies.

11

CRITICAL

MENU MATRIX

Confirm compound ingredients, premixes, sauces, seasonings, oils, stocks, toppings, decorations, release agents, and carriers are fully assessed.

☐ Compliant

☐ Partial

☐ Non-compliant

☐ N/A

i

Execution tip: Build each matrix row from current approved recipes and supplier specifications, not from memory, assumptions, or old menu copies.

12

CRITICAL

MENU MATRIX

Quarantine any menu item from publication when ingredient identity, supplier data, recipe ownership, or allergen information is incomplete or inconsistent.

SAFE

NEEDS ACTION

CRITICAL

LIVE PHOTO Add

i

Execution tip: Build each matrix row from current approved recipes and supplier specifications, not from memory, assumptions, or old menu copies.

3. Intentional allergens, cross-contact risk, precautionary statements, and evidence

13

CRITICALMENU MATRIX

Distinguish allergens intentionally present in the recipe from allergens that may arise through shared equipment, handling, storage, or service.

MENU ITEM	RECIPE	ALLERGEN	SOURCE	STATUS
-----------	--------	----------	--------	--------

i

Execution tip: Separate intentional ingredient presence from assessed cross-contact risk and record the evidence behind every matrix decision.

14

MENU MATRIX

Document the evidence supporting each allergen status, including supplier declarations, labels, recipes, process maps, cleaning studies, and site assessments.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
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i

Execution tip: Separate intentional ingredient presence from assessed cross-contact risk and record the evidence behind every matrix decision.

15

CRITICALMENU MATRIX

Verify precautionary allergen statements are risk based, approved, consistently worded, and not used as a substitute for effective controls.

☐ Compliant

☐ Partial

☐ Non-compliant

☐ N/A

i

Execution tip: Separate intentional ingredient presence from assessed cross-contact risk and record the evidence behind every matrix decision.

16

CRITICALMENU MATRIX

Assess shared fryers, grills, ovens, mixers, slicers, utensils, preparation tables, holding units, display areas, and serving tools for transfer risk.

SAFE

NEEDS ACTION

CRITICAL

LIVE PHOTO Add

i

Execution tip: Separate intentional ingredient presence from assessed cross-contact risk and record the evidence behind every matrix decision.

17

MENU MATRIX

Record whether an item can be modified safely, which ingredients can be removed or substituted, and which cross-contact risks remain unchanged.

MENU ITEM	RECIPE	ALLERGEN	SOURCE	STATUS
-----------	--------	----------	--------	--------

i

Execution tip: Separate intentional ingredient presence from assessed cross-contact risk and record the evidence behind every matrix decision.

18

CRITICALMENU MATRIX

Escalate any conflict between recipe data, pack labels, supplier declarations, operational practice, precautionary statements, and published menu information.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
--------	---------	-------	----------	--------

i

Execution tip: Separate intentional ingredient presence from assessed cross-contact risk and record the evidence behind every matrix decision.

4. Recipe changes, substitutions, specials, seasonal items, and matrix change control

19

CRITICALMENU MATRIX

Require allergen impact assessment before any ingredient, supplier, formulation, pack size, country of origin, or preparation method changes.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
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i

Execution tip: Update and approve allergen information before the changed ingredient, recipe, or menu item is purchased, prepared, published, or sold.

20

CRITICALMENU MATRIX

Control emergency purchases and substitutions so no replacement ingredient is used until specifications, labels, recipe impact, and matrix status are approved.

☐ Compliant☐ Partial☐ Non-compliant☐ N/A

i

Execution tip: Update and approve allergen information before the changed ingredient, recipe, or menu item is purchased, prepared, published, or sold.

21

MENU MATRIX

Review specials, chef features, seasonal menus, local products, test items, promotional bundles, and event menus before launch.

MENU ITEM	RECIPE	ALLERGEN	SOURCE	STATUS
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i

Execution tip: Update and approve allergen information before the changed ingredient, recipe, or menu item is purchased, prepared, published, or sold.

22

CRITICALMENU MATRIX

Update the recipe, matrix, printed menu, menu board, website, app, kiosk, POS, delivery platform, training, and store communication together.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
--------	---------	-------	----------	--------

i

Execution tip: Update and approve allergen information before the changed ingredient, recipe, or menu item is purchased, prepared, published, or sold.

23

MENU MATRIX

Remove obsolete recipes, labels, menu files, screenshots, cheat sheets, printed matrices, and system records after the new version is released.

SAFE

NEEDS ACTION

CRITICAL

LIVE PHOTO Add

i

Execution tip: Update and approve allergen information before the changed ingredient, recipe, or menu item is purchased, prepared, published, or sold.

24

MENU MATRIX

Record the change reason, affected items, old and new allergen status, approver, release date, locations, communication proof, and verification result.

NAME	DATE / TIME	APPROVAL
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i

Execution tip: Update and approve allergen information before the changed ingredient, recipe, or menu item is purchased, prepared, published, or sold.

5. Printed menus, symbols, legends, boards, counter displays, and customer information

25

CRITICAL

MENU MATRIX

Confirm printed menus show approved allergen symbols, wording, references, disclaimers, and instructions for customers seeking more information.

SAFE

NEEDS ACTION

CRITICAL

LIVE PHOTO

Add

i

Execution tip: Verify the customer sees the same approved allergen meaning everywhere, with clear legends and a route to trained assistance.

26

MENU MATRIX

Verify the allergen legend is complete, readable, placed near the menu information, and uses symbols that are distinct and consistently applied.

☐ Compliant

☐ Partial

☐ Non-compliant

☐ N/A

i

Execution tip: Verify the customer sees the same approved allergen meaning everywhere, with clear legends and a route to trained assistance.

27

CRITICAL

MENU MATRIX

Compare every printed menu item, modifier, description, and allergen symbol against the current approved matrix and recipe revision.

MENU ITEM	RECIPE	ALLERGEN	SOURCE	STATUS
-----------	--------	----------	--------	--------

i

Execution tip: Verify the customer sees the same approved allergen meaning everywhere, with clear legends and a route to trained assistance.

28

CRITICAL

MENU MATRIX

Check menu boards, table cards, counter displays, buffet labels, promotional materials, QR menus, and event menus use the same approved information.

SAFE

NEEDS ACTION

CRITICAL

LIVE PHOTO

Add

i

Execution tip: Verify the customer sees the same approved allergen meaning everywhere, with clear legends and a route to trained assistance.

29

CRITICAL

MENU MATRIX

Prevent unsupported free-from, allergen-free, gluten-free, vegan, plant-based, or similar claims unless the documented controls support the claim.

☐ Compliant

☐ Partial

☐ Non-compliant

☐ N/A

i

Execution tip: Verify the customer sees the same approved allergen meaning everywhere, with clear legends and a route to trained assistance.

30

MENU MATRIX

Remove damaged, handwritten, locally altered, expired, or obsolete menu materials and replace them with the controlled current version.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
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i

Execution tip: Verify the customer sees the same approved allergen meaning everywhere, with clear legends and a route to trained assistance.

6. POS, kiosks, websites, apps, delivery platforms, and data synchronization

31

CRITICAL

MENU MATRIX

Verify menu allergen data matches across POS, kitchen display systems, websites, mobile apps, kiosks, QR menus, call centres, and delivery partners.

MENU ITEM	RECIPE	ALLERGEN	SOURCE	STATUS
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i

Execution tip: Test the complete digital order journey because accurate matrix data can still fail through modifiers, integrations, substitutions, or stale channel content.

32

CRITICAL

MENU MATRIX

Confirm item codes, recipe IDs, variants, modifiers, combos, upsells, substitutions, unavailable items, and local menus map to the correct matrix record.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
--------	---------	-------	----------	--------

i

Execution tip: Test the complete digital order journey because accurate matrix data can still fail through modifiers, integrations, substitutions, or stale channel content.

33

CRITICAL

MENU MATRIX

Test that allergen alerts and customer requests remain visible from order entry through kitchen production, packing, dispatch, and handoff.

SAFE

NEEDS ACTION

CRITICAL

LIVE PHOTO Add

i

Execution tip: Test the complete digital order journey because accurate matrix data can still fail through modifiers, integrations, substitutions, or stale channel content.

34

MENU MATRIX

Restrict permissions for changing allergen fields, menu descriptions, modifiers, claims, and publication status, with a traceable audit history.

☐ Compliant

☐ Partial

☐ Non-compliant

☐ N/A

i

Execution tip: Test the complete digital order journey because accurate matrix data can still fail through modifiers, integrations, substitutions, or stale channel content.

35

CRITICAL

MENU MATRIX

Check integration failures, delayed updates, offline menus, cached content, language versions, and third-party edits cannot expose outdated information.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
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i

Execution tip: Test the complete digital order journey because accurate matrix data can still fail through modifiers, integrations, substitutions, or stale channel content.

36

MENU MATRIX

Complete a release verification across representative devices and channels after each approved matrix or menu update.

NAME	DATE / TIME	APPROVAL
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i

Execution tip: Test the complete digital order journey because accurate matrix data can still fail through modifiers, integrations, substitutions, or stale channel content.

7. Kitchen execution, allergen-sensitive modifications, final verification, and handoff

37

CRITICALMENU MATRIX

Confirm kitchen recipe cards, ingredient labels, preparation instructions, equipment rules, and garnish details match the approved menu matrix.

☐ Compliant☐ Partial☐ Non-compliant☐ N/A

i

Execution tip: Trace sampled items from matrix information to live preparation and final handoff to confirm the published data matches actual practice.

38

CRITICALMENU MATRIX

Verify employees check the current matrix before answering a customer, accepting a modification, or preparing an allergen-sensitive order.

SAFENEEDS ACTIONCRITICALLIVE PHOTO Add

i

Execution tip: Trace sampled items from matrix information to live preparation and final handoff to confirm the published data matches actual practice.

39

CRITICALMENU MATRIX

Record allergen requests clearly in the POS or order record and carry the information through tickets, displays, callouts, labels, packaging, and handoff.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
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i

Execution tip: Trace sampled items from matrix information to live preparation and final handoff to confirm the published data matches actual practice.

40

CRITICALMENU MATRIX

Use approved ingredients, tools, preparation areas, cleaning status, PPE, containers, and workflow for allergen-sensitive modifications.

☐ Compliant☐ Partial☐ Non-compliant☐ N/A

i

Execution tip: Trace sampled items from matrix information to live preparation and final handoff to confirm the published data matches actual practice.

41

CRITICALMENU MATRIX

Complete an independent final check of the item, sides, sauces, garnish, packaging, order number, allergen request, and customer destination.

MENU ITEM	RECIPE	ALLERGEN	SOURCE	STATUS
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i

Execution tip: Trace sampled items from matrix information to live preparation and final handoff to confirm the published data matches actual practice.

42

CRITICALMENU MATRIX

Stop production or handoff when the matrix, recipe, ingredient label, substitution, or process cannot be verified with confidence.

SAFENEEDS ACTIONCRITICALLIVE PHOTO Add

i

Execution tip: Trace sampled items from matrix information to live preparation and final handoff to confirm the published data matches actual practice.

8. Employee training, customer enquiries, escalation, and service communication

43

MENU MATRIX

Train relevant employees to read the matrix, understand symbols and limitations, locate source records, and follow the approved customer enquiry process.

RECORD

CURRENT

OWNER

EVIDENCE

ACTION



Execution tip: Assess practical employee behaviour, not only training attendance, and require escalation whenever information is missing or uncertain.

44

CRITICAL

MENU MATRIX

Assess practical competency for employees who create recipes, maintain data, publish menus, answer customers, prepare orders, verify handoff, or investigate incidents.

☐ Compliant☐ Partial☐ Non-compliant☐ N/A

Execution tip: Assess practical employee behaviour, not only training attendance, and require escalation whenever information is missing or uncertain.

45

CRITICAL

MENU MATRIX

Confirm employees do not guess, interpret unclear data, promise a product is safe, or make unsupported claims when the matrix is incomplete.

SAFE

NEEDS ACTION

CRITICAL

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Execution tip: Assess practical employee behaviour, not only training attendance, and require escalation whenever information is missing or uncertain.

46

CRITICAL

MENU MATRIX

Provide a clear escalation route to a trained manager or food-safety owner and define when an item must not be offered.

RECORD

CURRENT

OWNER

EVIDENCE

ACTION



Execution tip: Assess practical employee behaviour, not only training attendance, and require escalation whenever information is missing or uncertain.

47

MENU MATRIX

Verify customer-facing teams explain that removal of an ingredient may not remove cross-contact risk when shared processes remain.

☐ Compliant☐ Partial☐ Non-compliant☐ N/A

Execution tip: Assess practical employee behaviour, not only training attendance, and require escalation whenever information is missing or uncertain.

48

MENU MATRIX

Observe live customer enquiries and sampled orders to confirm verbal communication, system records, kitchen practice, and final handoff remain aligned.

SAFE

NEEDS ACTION

CRITICAL

[LIVE PHOTO](#) [Add](#)

Execution tip: Assess practical employee behaviour, not only training attendance, and require escalation whenever information is missing or uncertain.

9. Verification, menu sampling, complaints, incidents, and corrective actions

49

CRITICALMENU MATRIX

Sample menu items and compare current ingredients, pack labels, recipes, preparation, matrix entries, printed information, and digital channels.

MENU ITEM	RECIPE	ALLERGEN	SOURCE	STATUS
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i

Execution tip: Use independent checks and real order samples to find mismatches before customers do, then keep actions open until the full information chain is corrected.

50

MENU MATRIX

Verify the review sample covers high-risk items, complex recipes, common modifications, limited-time offers, local substitutions, and shared equipment.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
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i

Execution tip: Use independent checks and real order samples to find mismatches before customers do, then keep actions open until the full information chain is corrected.

51

CRITICALMENU MATRIX

Treat a wrong allergen entry, missing symbol, recipe mismatch, unsupported claim, or failed order communication as an urgent food-safety finding.

☐ Compliant

☐ Partial

☐ Non-compliant

☐ N/A

i

Execution tip: Use independent checks and real order samples to find mismatches before customers do, then keep actions open until the full information chain is corrected.

52

CRITICALMENU MATRIX

Stop sale or publication, isolate affected items, preserve evidence, identify exposed channels and locations, and activate the approved incident process.

SAFE

NEEDS ACTION

CRITICAL

LIVE PHOTO Add

i

Execution tip: Use independent checks and real order samples to find mismatches before customers do, then keep actions open until the full information chain is corrected.

53

CRITICALMENU MATRIX

Investigate root cause across supplier data, recipe control, matrix logic, system mapping, publication, training, kitchen execution, and approval failures.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
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i

Execution tip: Use independent checks and real order samples to find mismatches before customers do, then keep actions open until the full information chain is corrected.

54

MENU MATRIX

Assign corrective actions with named owners, deadlines, affected items, evidence requirements, channel updates, retraining, and follow-up verification.

NAME	DATE / TIME	APPROVAL
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i

Execution tip: Use independent checks and real order samples to find mismatches before customers do, then keep actions open until the full information chain is corrected.

10. Approval, release, multi-location deployment, review, records, and management sign-off

55

CRITICAL

MENU MATRIX

Complete an independent technical review of the matrix against approved supplier specifications, ingredient labels, recipes, processes, and legal requirements.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
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i

Execution tip: Release one controlled matrix version, verify deployment across locations and channels, and retain objective evidence of review and approval.

56

CRITICAL

MENU MATRIX

Approve the final matrix with version number, effective date, menu scope, markets, channels, locations, reviewer, approver, and next review date.

NAME	DATE / TIME	APPROVAL
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i

Execution tip: Release one controlled matrix version, verify deployment across locations and channels, and retain objective evidence of review and approval.

57

MENU MATRIX

Distribute the controlled version to every location and channel, confirm receipt, remove obsolete copies, and document deployment exceptions.

RECORD	CURRENT	OWNER	EVIDENCE	ACTION
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i

Execution tip: Release one controlled matrix version, verify deployment across locations and channels, and retain objective evidence of review and approval.

58

CRITICAL

MENU MATRIX

Verify representative locations, menus, systems, and employee teams are using the released version and understand significant changes.

SAFE

NEEDS ACTION

CRITICAL

LIVE PHOTO Add

i

Execution tip: Release one controlled matrix version, verify deployment across locations and channels, and retain objective evidence of review and approval.

59

MENU MATRIX

Review the matrix at the defined frequency and immediately after supplier, ingredient, recipe, process, equipment, legal, complaint, or incident changes.

☐ Compliant

☐ Partial

☐ Non-compliant

☐ N/A

i

Execution tip: Release one controlled matrix version, verify deployment across locations and channels, and retain objective evidence of review and approval.

60

CRITICAL

MENU MATRIX

Record final approval, unresolved risks, temporary controls, overdue actions, review outcome, next verification date, and management signatures.

NAME	DATE / TIME	APPROVAL
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i

Execution tip: Release one controlled matrix version, verify deployment across locations and channels, and retain objective evidence of review and approval.