CALGARY SAFETY CONSULTANTS

Formal Hazard Assessment Worksheet

Site, job, task and equipment assessments

How to use this worksheet

Use this worksheet to complete one formal hazard assessment: a site or area, a job or position (a job hazard analysis, or JHA), a critical task, or a piece of equipment or process. Build it with the workers who do the work and your joint health and safety committee or representative. Fill it in on screen or print it. Keep the completed worksheet with your hazard assessment register and review it on schedule and whenever a trigger in Part G occurs.

- **Part A** records the assessment details and type. The guide below it helps you choose the right type.
- **Part B** is your hazard inventory: every site, job and piece of equipment that needs an assessment. Complete it once and keep it updated.
- **Part C** is a site or area hazard checklist. **Part D** is the full JHA worksheet, with a risk rating guide and the hierarchy of controls.
- **Part E** turns new controls into actions. **Part F** records worker participation and approval. **Part G** lists review triggers and holds the review log.
- The field-level hazard assessment (FLHA) is the daily check on site. It references this assessment; it doesn't replace it.

Key terms

Term	What it means
Formal hazard assessment	A planned, written, dated and approved assessment of hazards, completed before the work begins and reviewed on a set cycle.
Job hazard analysis (JHA)	A formal assessment of one job or position: its tasks, the steps in each task, the hazards, the risk and the controls.
Hazard inventory	The master list of sites, jobs, tasks, equipment and processes the formal assessment must cover.
Initial and residual risk	Initial risk is rated with no added controls. Residual risk is what remains once the chosen controls are in place.
Hierarchy of controls	Choose the most effective controls first: eliminate, substitute, engineering, administrative, then PPE.
FLHA	Field-level hazard assessment: a short daily check by the crew that confirms the formal controls and catches today's conditions.

Part A: Assessment details

Organization

Assessment number

Version

Date prepared

Site, area, job, task or equipment assessed

Province, territory or federal

Type of assessment

- ☐ Site or area
- ☐ Job or position (JHA)
- ☐ Task-based (critical task)
- ☐ Equipment or process
- ☐ Change-triggered reassessment
- ☐ Post-incident review

Reason for this assessment

- ☐ First assessment
- ☐ Scheduled review
- ☐ New work process
- ☐ Process or operation change
- ☐ Site addition or alteration
- ☐ New equipment or chemical
- ☐ Incident or near miss
- ☐ Worker or committee concern
- ☐ Officer or client request

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Choosing the right assessment type

If you are	Complete
Opening a new shop, office or yard, or starting a project site	A site or area assessment, then check every JHA used there
Creating a position or hiring into a job you haven't assessed	A JHA for that job or position
Planning a high-risk, infrequent or shared task	A task-based assessment and a safe work procedure
Buying, modifying or moving equipment, or adding a chemical or process	An equipment or process assessment; update the JHAs that use it
Changing methods, materials, staffing or schedules	Reassess the affected JHAs and tasks before work continues
Following up an incident, near miss or worker concern	Review the related JHA, task or site assessment
Starting a shift or task on site	An FLHA that references this assessment

Part B: Hazard inventory

List everything your formal hazard assessment must cover. Every line should end up with a current, dated assessment and a next review date.

Sites and work areas

Site or area	Type (permanent or project)	Assessment no.	Date	Next review

Jobs and positions

Job or position	Workers	Main tasks	JHA no.	Date	Next review

Critical tasks, equipment, chemicals and processes

Task, equipment or process	Used by (jobs)	Assessment no.	Date	Next review

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Part C: Site or area hazard checklist

For a site or area assessment, tick each hazard present and describe where it applies in the notes. Carry anything job-specific into the JHA.

Hazards present at the site or area

- ☐ Vehicle and equipment traffic
- ☐ Poor lighting
- ☐ Dust, fumes or vapours
- ☐ Stored energy or pressure
- ☐ Fire or explosion sources
- ☐ Nearby operations or contractors
- ☐ Slips, trips and uneven ground
- ☐ Weather, heat or cold
- ☐ Hazardous products stored
- ☐ Confined spaces
- ☐ Working alone or remote
- ☐ Emergency access and exits
- ☐ Work at height or open edges
- ☐ Noise
- ☐ Overhead or buried utilities
- ☐ Excavations or trenches
- ☐ Public, client or animal contact
- ☐ Security and violence

Notes: where each hazard applies and controls already in place

Part D: Job hazard analysis (JHA) worksheet

Job or position

Department or crew

JHA number

Prepared by

Workers who helped (see Part F)

Date

Required PPE

Required training or certification

Related safe work procedures or practices

Equipment and tools used

Risk rating guide. Rate each hazard by likelihood and severity, before and after controls.

Rating	Likelihood	Severity
1	Rare: not expected; no history here or in similar work	Minor: first aid or no injury
2	Unlikely: could happen, but hasn't in years	Moderate: medical aid, no lost time
3	Possible: has happened here or is common in similar work	Serious: lost time injury or illness
4	Likely: happens from time to time	Major: permanent injury or long-term illness
5	Almost certain: happens often or is expected	Critical: fatality or multiple serious injuries

Risk score = likelihood x severity. 1 to 4 low (routine controls); 5 to 9 medium (plan controls); 10 to 16 high (act promptly); 20 to 25 critical (stop or don't start the work until the risk is reduced). Use your own company matrix if you have one, and use it consistently.

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Hierarchy of controls

Level	Examples
Eliminate	Remove the hazard or the task: work from the ground instead of at height, buy pre-cut material.
Substitute	Replace with something less hazardous: a water-based product, a smaller or lighter part.
Engineering	Isolate people from the hazard: guards, ventilation, barriers, interlocks, lifting aids.
Administrative	Change the way people work: safe work procedures, permits, training, signs, scheduling, supervision.
PPE	Protect the worker: hard hat, eye, hearing and respiratory protection, gloves, fall arrest. Last line of defence.

JHA: task steps, hazards and controls

Break each task into 3 to 10 steps in the order they're done. Initial risk = L x S with no added controls. In the Controls column, note the level (E, S, Eng, Adm, PPE). Residual risk is rated with the controls in place.

No.	Task step	Hazards (what could happen)	Initial risk	Controls (level)	Residual risk	Responsible

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Part E: Control action plan

List each new or improved control from Parts C and D that isn't in place yet. Don't start the work while a high or critical risk is still open.

Control to put in place	Hazard or step	Owner	Due date	Done	Verified by
				☐	
				☐	
				☐	
				☐	
				☐	
				☐	
				☐	

Part F: Worker participation and sign-off

How workers took part

- ☐ Walked the job with workers
- ☐ Workers described the steps
- ☐ Observed the task being done
- ☐ Crew or team meeting
- ☐ Committee or representative review
- ☐ Survey or suggestion input

What workers raised, and what changed because of it

Name	Job or role	Took part in	Signature	Date

Assessment led by | **Signature** | **Date**

Committee co-chair or representative | **Signature** | **Date**

Approved by (manager) | **Signature** | **Date**

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Communication

- ☐ Reviewed with every worker who does this job
- ☐ Linked to the FLHA form
- ☐ Posted or loaded where workers can reach it
- ☐ Added to orientation and training

Part G: Review triggers and review log

Review this assessment before the work continues whenever one of these occurs, and on the scheduled date even if nothing seems to have changed.

- ☐ A new work process, task or position is introduced, or an existing one changes.
- ☐ New or modified equipment, tools, chemicals or materials.
- ☐ A significant addition or alteration to the site, or work at a new location.
- ☐ An incident, near miss, inspection finding or FLHA reveals a hazard or a control that isn't working.
- ☐ A worker, supervisor, committee, client or officer raises a concern.
- ☐ A change in legislation, standards or manufacturer's instructions.
- ☐ The scheduled review date arrives (set the frequency in your procedure; annually is common).

Review frequency	Next scheduled review date	Responsible for review

Review date	Reason	What changed (or no change)	Reviewed by	Workers involved	Version
				☐	
				☐	
				☐	
				☐	
				☐	
				☐	

Worked example: one JHA step

Field	Example entry (illustrative)
Job and task	Service technician: drain a commercial hot water boiler for repair.
Step	3. Open the drain valve and run the hose to the floor drain.
Hazards	Scalding from hot water or steam; hose whipping; slips on wet floor; back strain from awkward position.
Initial risk	Likelihood 3 x severity 4 = 12 (high).
Controls	Eng: secure the hose end with a clamp or restraint. Adm: let the boiler cool to a set temperature, confirmed on the gauge, before draining; lock out the burner and pumps per the procedure; wet floor signs. PPE: face shield, insulated gloves.
Residual risk	Likelihood 1 x severity 4 = 4 (low). Responsible: lead technician.

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Hazard prompt list

Use these prompts when identifying hazards in each step. Think about health hazards as well as safety hazards, and about what happens when things go wrong, not only when they go right.

Category	Ask about
Physical and energy	Moving equipment and vehicles, rotating parts, pinch points, gravity (falls, falling objects), electricity, pressure, heat and cold, noise, vibration, radiation, stored energy.
Chemical	Hazardous products, dusts, fumes, vapours, gases, flammables, products created by the work (welding fume, silica dust, exhaust).
Biological	Mould, bacteria, viruses, blood and body fluids, animal or insect contact, contaminated water or waste.
Ergonomic	Lifting, pushing and pulling, awkward postures, repetition, forceful gripping, poor workstation layout.
Psychosocial	Fatigue, workload, working alone, violence and harassment, stress, shift work, impairment.
Environment and site	Weather, lighting, slips and trips, confined spaces, excavations, traffic, nearby work, remote locations, emergency access.

Jurisdiction notes

Jurisdiction	What it means for this worksheet
Alberta	Complete and date the assessment before work begins, involve affected workers in the assessment and in controlling the hazards, and repeat it on the OHS Code triggers in Part G.
Yukon	Hazard assessments are required for every employer; Yukon's board publishes formal and site-specific templates.
Other provinces and territories	Hazard identification and control is part of the written program once you reach the size threshold; general duties to inform workers apply to everyone.
Federal	Keep a record of hazards; apply the federal order of preventive measures (PPE before administrative procedures); evaluate at least every 3 years.

Summary only. See the Hazard Assessment Program Checklist for a full jurisdiction table, and check the current legislation that applies to you.

Common mistakes to avoid

- Filling in the form at a desk without watching the job or talking to the workers who do it.
- Listing hazards without rating the risk, or rating everything the same.
- Going straight to PPE and training when elimination or engineering controls are possible.
- Leaving out maintenance, cleaning, set-up, driving, call-outs and seasonal tasks.
- No record of who took part, or no date on the assessment.
- Treating daily FLHAs as a substitute for this formal assessment.
- Never reviewing: every assessment carrying the same old date.

Free guide. Read How to Complete a Formal Hazard Assessment at calgarysafetyconsultants.ca/safety-guides/hazard-management/formal-hazard-assessment/. Questions? Call Calgary Safety Consultants at 1-888-231-0358.

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