



A health and safety system is the way an employer manages health and safety across the whole business. Use this checklist with our guide, **How to Build a Health and Safety System**, to plan the build and check that nothing is missed. Click a box to tick it, or print the checklist and work through it with your managers, supervisors and health and safety committee or representative.

Organization

Completed by

Date

Start with your requirements

- ☐ We know which OHS legislation applies: the province or territory where each worker works, or the federal rules if we're federally regulated.
- ☐ We've checked whether we meet our jurisdiction's threshold for a formal written health and safety program, and what the law says it must include.
- ☐ We know where the health and safety system sits in our operational management system (OMS), and which processes it shares, such as document control, internal audit and management review.
- ☐ If we're working toward ISO 45001, COR or SECOR, we have the current standard or the certifying partner's current audit standard.

1. Legal requirements and scope

- ☐ A **legal requirements register** lists each requirement that applies to us, the document that meets it and who's responsible for it.
- ☐ The register is reviewed whenever the law or our work changes.
- ☐ The scope of the system is set: the sites, activities, workers and contractors it covers.

2. Management commitment and responsibilities

- ☐ A short health and safety policy, specific to our business, is approved and **signed by senior management**.
- ☐ Responsibilities are defined for owners, managers, supervisors, workers, contractors and safety personnel.
- ☐ The people assigned responsibilities have the **time, authority and resources** to carry them out.

3. Worker involvement

- ☐ A joint health and safety committee or representative is in place where the law requires one.
- ☐ Workers are asked before, during and after each part of the system is written.
- ☐ Workers have simple ways to raise concerns and suggest improvements, and they hear back.

4. Hazard identification and risk assessment

- ☐ Hazard assessments cover routine and non-routine work, equipment, materials, the work environment and possible emergencies.
- ☐ Physical, chemical, biological, ergonomic and psychosocial hazards are considered, including work done by contractors, visitors and people working alone.
- ☐ Job hazard analyses are done for tasks with significant risk, and field-level hazard assessments catch changing conditions before each job.



5. Effective controls

- ☐ Controls follow the **hierarchy of controls**: elimination and substitution first, then engineering controls, administrative controls and PPE.
- ☐ Controls are checked in the field to confirm they work as intended and aren't being bypassed.

6. Programs and procedures

- ☐ Health and safety programs or codes of practice are in place for hazards that need a whole set of controls, training and records, such as ground disturbance, fall protection or confined space entry.
- ☐ Safe work practices and safe job procedures are written for the activities where consistent instructions matter.
- ☐ Each procedure has been walked through with the workers who do the task, and rewritten if they couldn't follow it.
- ☐ **Management of change**: new equipment, processes, people and work sites are assessed before they're introduced.
- ☐ **Contractor management**: contractors and suppliers meet our requirements before and during the work.

7. Orientation, training and competency

- ☐ Orientation covers workplace hazards, emergency procedures, required PPE, how to report hazards and incidents, the right to refuse unsafe work and job-specific instructions.
- ☐ Supervisors are trained in their legal responsibilities and in leading hazard assessments, inspections and investigations.
- ☐ A training matrix shows which roles need which training and when it expires.
- ☐ Competency is verified by demonstration, practical assessment or observation, and training records are kept.

8. Inspections and corrective actions

- ☐ Inspections are scheduled based on risk and legal requirements, including equipment inspections, preventive maintenance and supervisor checks.
- ☐ Every deficiency is recorded and assigned to a responsible person with a completion date.
- ☐ Each corrective action is **verified** to have controlled the hazard before it's closed.

9. Emergencies and incidents

- ☐ Emergency response procedures are built from credible scenarios, including events that need rescue.
- ☐ First aid meets the requirements where we work, and the plan is tested with drills and exercises.
- ☐ Injuries, occupational illnesses and near misses are reported and investigated for underlying causes, not blame.

10. Monitor, evaluate and improve

- ☐ Measurable objectives are set, with leading indicators (such as inspections completed and overdue actions) and lagging indicators (such as incidents and claims).
- ☐ The system is evaluated at least once a year, after a serious incident or significant change, and within any maximum interval our jurisdiction sets.
- ☐ Internal reviews or audits look for recurring problems, and the system is updated when work, people or the law change.
- ☐ A **management review** is held with senior management as part of the business's regular planning cycle.



Organize the documents

- ☐ Four levels are in place: **policy, programs, safe work practices and forms**.
- ☐ Every document points both ways: it names the program it supports and the forms it uses.
- ☐ No lower-level document contradicts a higher one.
- ☐ Each controlled document has an owner, version number, approval date and review date.
- ☐ One **master document list** shows the current version of everything.
- ☐ Obsolete copies are withdrawn, including printed copies in trucks and site trailers.
- ☐ Records are kept, protected and retrievable for as long as required.
- ☐ If we use a safety manual, every document in it goes through document control.

A practical six-month plan

For a small to mid-sized employer building its first system on its own. Deal with urgent hazards and mandatory legal requirements immediately, whatever the phase.

Month 1	Months 2 to 4	Month 5	Month 6
☐ Legal review and gap assessment	☐ Policy approved	☐ Documents approved and issued	☐ Inspections and an emergency exercise run
☐ Legal requirements register	☐ Programs, practices and forms drafted with the people who use them, highest risks first	☐ Supervisors and workers trained, competency verified	☐ Deficiencies corrected
☐ Initial hazard assessment	☐ Each draft reviewed and revised	☐ Inspections, incident reporting and emergency arrangements started	☐ First records reviewed with the committee or representative
☐ Document structure and control			☐ First management review held
☐ Drafting team with workers and the committee			

The working test

Pick one significant hazard and trace how the business manages it, down through the documents and back up again. Tick each link you can show.

☐ Hazard assessment	☐ Control chosen	☐ Program or procedure	☐ Training	☐ Inspections	☐ Corrective actions
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Hazard traced

Gaps found and who will fix them

Want to move faster? With professional help, Calgary Safety Consultants can set your organization on track with a 90-day plan. Read the full guide at calgarysafetyconsultants.ca/safety-guides/safety-programs/health-and-safety-system/ or call 1-888-231-0358.