CALGARY SAFETY CONSULTANTS

HSR Appointment and Support Checklist

How to use this checklist

This checklist walks an employer through the eight steps in our guide, How to Appoint and Support a Health and Safety Representative: confirm the requirement, let workers choose, record and post the name, train, give paid time and information, inspect and listen, respond to recommendations, and review the role every year. It doubles as the record set an officer or auditor will ask to see.

How to use this form

- Complete page 1 to confirm whether you need a representative. Page 2 summarizes the rules for every jurisdiction.
- Work through pages 3 to 6 with the representative. Tick each box when it's done, and fill in the records as you go.
- Keep the completed form with your health and safety program, and update it whenever the representative, headcount or law changes.
- Where this form and your legislation differ, follow the legislation. Rules change, so check the current law for your jurisdiction.

Key terms

Term	What it means here
Health and safety representative	A worker who represents co-workers on health and safety in a workplace too small for a joint committee. Local names include worker health and safety representative and occupational health and safety representative.
Regularly employed	Workers who normally work at the workplace, counted the way your jurisdiction counts them. Check whether part-time, seasonal and contract workers count.
Managerial functions	Directing, hiring, disciplining or evaluating other workers. People with these functions generally can't be the representative.
Alternate	A second person, chosen the same way, who covers absences. British Columbia's Act lets the representative designate one (s. 46).
Written response	The employer's written answer to a recommendation: accepted with a date, or rejected with reasons.

Workplace details

Employer

Workplace or site

Completed by

Workers regularly employed

Date counted

Union (if any)

Next headcount check

Jurisdiction (tick one)

- ☐ Alberta
- ☐ British Columbia
- ☐ Saskatchewan
- ☐ Manitoba
- ☐ Ontario
- ☐ Quebec
- ☐ Federal (Canada Labour Code)
- ☐ Nova Scotia
- ☐ New Brunswick
- ☐ Prince Edward Island
- ☐ Newfoundland and Labrador
- ☐ Northwest Territories
- ☐ Nunavut
- ☐ Yukon

Result

- ☐ A representative is required
- ☐ A committee is required (20 or more in most jurisdictions)
- ☐ Neither is required yet
- ☐ We choose a voluntary representative or committee

Quebec works differently: a health and safety representative sits alongside the committee at 20 or more workers, and an agent de liaison (liaison officer) serves establishments with 19 or fewer.

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Jurisdiction quick reference

The rules below summarize the guide's comparison tables, with section references. Thresholds, exceptions and multi-employer rules vary, and a regulator can order a representative where the law wouldn't otherwise require one. Confirm the current law before you act.

Jurisdiction	Local name and when required	How chosen	Training	Response
Alberta	Health and safety representative; 5 to 19 regularly employed workers (OHS Act s. 14(1)); a committee may be set up instead (s. 14(6))	Employer designates a worker not associated with management, after consulting any union	Employer ensures training (OHS Code s. 201)	No fixed number of days
British Columbia	Worker health and safety representative; more than 9 but fewer than 20 workers (WCA s. 45(1))	Workers who don't exercise managerial functions, by union procedure or secret ballot (ss. 45(2), 34)	4 hours within 6 months (OHS Regulation s. 3.27(3)); 8 hours educational leave a year (WCA s. 41)	Written, 21 days, when a response is requested (s. 39)
Saskatchewan	OHS representative; 5 to 9 workers at Table 7 prescribed workplaces (Regulations s. 4-8)	Employer must have one in place; co-workers appoint, or the union under its bylaws (ministry)	Training on the role (s. 4-9(1)); up to 5 working days of leave a year (s. 4-9(3))	Written, after written notice of an unsafe condition (s. 3-17(2))
Manitoba	Worker safety and health representative; 5 to 19 regularly employed workers (Act s. 41)	Elected by the workers represented, or under the union constitution	Competent training (s. 41(8)); yearly leave of 2 shifts or 16 hours, whichever is greater (s. 44)	30-day rule (s. 41.1) is described for committees; check the Act
Ontario	Health and safety representative; more than 5 regularly employed workers, no committee required (OHSA s. 8(1))	Workers who don't exercise managerial functions, or the union (s. 8(5))	Not required by the Act; still good practice	Written, 21 days (s. 8(12))
Quebec	Représentant en santé et en sécurité with the committee at 20 or more workers (Act s. 87); agent de liaison at 19 or fewer	Designated like the workers' committee representatives (s. 89)	CNESST training attestation (mandatory since Jan 1, 2024); agent de liaison also needs an attestation	Recommendations to the committee, or to workers and employer (s. 90(4))
Federal	Health and safety representative; fewer than 20 employees or no committee required (CLC s. 136(1))	Non-managerial employees, majority vote if no union (SOR/2015-164 s. 11), or the union; 2-year term (s. 12)	Prescribed training (CLC s. 125(1)(z.01)); content in SOR/2015-164 s. 14	Written, 30 days (s. 125(1)(z.10))
Nova Scotia	Health and safety representative; 5 or more employees, no committee required (OHS Act s. 33(1))	Employees select from employees not connected with management	Additional training as prescribed (s. 13(2)(c))	Written, 21 days, when a response is requested (s. 34(1))
New Brunswick	Health and safety representative; 5 to 19 employees, if the safety policy provides for one or WorkSafeNB requires it (s. 17); project sites with more than 5 but fewer than 30 employees (s. 17.1)	Employees elect (s. 17(3)); project sites: contractor and employees jointly (s. 17.1(3))	Project site representatives: prescribed educational program (s. 17.1(2))	No fixed period; on disagreement, call an officer (s. 18(3))
Prince Edward Island	Occupational health and safety representative; 5 or more workers, no committee required (OHS Act s. 26(1))	Workers select from non-managerial workers	Time off for prescribed training (s. 26(4))	Written, 30 days from the request (s. 27(1))
Newfoundland and Labrador	Worker health and safety representative; fewer than 20 workers (s. 41(1)); under 6, a workplace designate if a representative is impracticable (s. 42.1)	Elected by workers or appointed under the union constitution (s. 42)	Employer provides and pays for training meeting Commission requirements (s. 41(2), (3))	Written, 30 days (s. 5(f.1))
Northwest Territories and Nunavut	OHS representative; fewer than 20 workers and no committee (OHS Regulations s. 39)	Employer designates at least one worker	Training on duties and functions (s. 51(2))	Written reply as soon as reasonably possible (s. 52)
Yukon	Worker health and safety representative; 5 to 19 regularly employed workers (Yukon WSCB)	Chosen by workers; no managerial role	Orientation within 30 days; competency training within 6 months, at the employer's cost	No fixed period stated by the regulator

Newfoundland and Labrador, the Northwest Territories and Nunavut and federal workplaces have no lower threshold. Nova Scotia and Prince Edward Island let the Director order a representative where fewer than five people work. Ontario also requires a representative at farming operations with more than five regularly employed workers and no committee.

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Step 1: Confirm the requirement

- [ ] We counted regularly employed workers the way our jurisdiction counts them.
- [ ] We checked the threshold for our jurisdiction on page 2 and recorded the result on page 1.
- [ ] We set a date to recount, at least every quarter if the business is growing.

Step 2: Let workers choose

- [ ] We explained the role to workers: what it involves, roughly how much time it takes and that it is paid.
- [ ] We asked for volunteers or nominations and gave people a few days to think about it.
- [ ] Workers (or the union) chose the representative, where the law says so. Management did not pick the person.
- [ ] Where our law has the employer designate (Alberta, Northwest Territories, Nunavut), we consulted any union and asked workers for names first.
- [ ] The representative does not exercise managerial functions (required in most jurisdictions, and good practice everywhere).
- [ ] An alternate was chosen the same way to cover absences.

Selection record

Representative's name | **Job title** | **Shift or crew**

Alternate's name | **Date chosen** | **Term ends** | **Number who took part**

How the representative was chosen

- [ ] Secret ballot
- [ ] Show of hands
- [ ] Union appointment
- [ ] Only nominee, accepted by workers
- [ ] Employer designation (where the law allows)

Step 3: Record and post

- [ ] The representative's name and how to reach them are posted where workers will see them.
- [ ] Federal workplaces: the posting includes the work phone number and work location.
- [ ] The name is covered at orientation for every new worker.
- [ ] The selection record and posting date are filed with the health and safety program.
- [ ] We know the vacancy rule: a new representative is chosen quickly if this one leaves (30 days federally).

Where the name is posted | **Date posted** | **Checked by**

Notes on the selection (nominees, questions raised, how workers were told the result)

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Step 4: Train the representative

- [ ] We know our jurisdiction's training rule (page 2) and the deadline, such as 4 hours within 6 months in British Columbia.
- [ ] Training covers the role, inspections, investigations, work refusals and workers' rights.
- [ ] Training is on paid time, and course costs are covered by the employer.
- [ ] The alternate is trained too, or booked for training.
- [ ] We plan a refresher at least every three years.

Course or training	Provider	Date	Hours	Certificate on file	Next due
				☐	
				☐	
				☐	
				☐	
				☐	

Step 5: Give paid time, information and resources

- [ ] Representative work and required training are treated as paid work time.
- [ ] Supervisors know to release the representative for inspections, investigations and meetings.
- [ ] The representative gets the hazard information they ask for, inspector orders and reports, and incident notices.
- [ ] The representative has a place to keep records and access to a computer, printer and phone.
- [ ] We meet regularly, and the representative knows they can ask for a special meeting on urgent concerns.
- [ ] We consult the representative before changes that may affect health and safety.
- [ ] Everyone knows reprisal for raising concerns or carrying out the role is prohibited.

Time set aside each month (hours)

Regular meeting day and time

Employer contact

Resources provided (place, equipment, information access)

Regular meetings with the representative

Date	Topics (open concerns, inspections, incidents, changes)	Actions agreed	Notes filed
			☐
			☐
			☐
			☐

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Step 6: Inspections, investigations and concerns

- ☐ An inspection schedule is agreed with the representative (Ontario: whole workplace monthly, or yearly plus part each month; federal: each month).
- ☐ The representative is called early after serious incidents and takes part in investigations.
- ☐ Our work refusal procedure says how and when the representative is involved.
- ☐ Workers know how to bring concerns to the representative.

Inspection area or route	Frequency	Last done	Next due	Done
				☐
				☐
				☐
				☐

Step 7: Concerns and recommendations log

Log every concern and written recommendation. Answer written recommendations in writing, on time: 21 days in Ontario, Nova Scotia and British Columbia (Nova Scotia and British Columbia when a response is requested), 30 days federally, in Newfoundland and Labrador and in Prince Edward Island. Where there's no legal clock, aim for 21 to 30 days anyway.

Date received	Concern or recommendation	Response due	Response date	Outcome and owner	Closed
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐
					☐

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Step 8: Review the role every year

- [ ] The representative had the time they needed, and it was paid.
- [ ] Training is current, including any refresher due.
- [ ] Inspections happened on schedule, with reports on file.
- [ ] Every written recommendation got a written response on time.
- [ ] Workers know who the representative is and are bringing concerns forward.
- [ ] The headcount still fits a representative (not a committee).
- [ ] The term, alternate and posting are up to date.

Common mistakes to avoid

- Management picking the representative, or naming a supervisor or lead hand.
- Skipping training, or expecting the work on breaks and after hours.
- Leaving written recommendations unanswered past the legal deadline.
- Not posting the name, or letting the role lapse when the representative leaves.
- Missing the point where growth means a committee is required instead.

What an auditor will look for

- A record of how the representative was chosen, and written duties.
- Training records that meet your jurisdiction's rules.
- Inspection and investigation records the representative took part in.
- A dated log of concerns and recommendations with written responses.
- Posted contact details, and workers who can name their representative.

Review notes and actions

Employer representative | **Signature** | **Date**

Health and safety representative | **Signature** | **Date**

Next review date | **Next headcount check** | **Form location**

Free guide. Read How to Appoint and Support a Health and Safety Representative at calgarysafetyconsultants.ca/safety-guides/committees/health-and-safety-representative/. Need representative training or help with SECOR? Call Calgary Safety Consultants at 1-888-231-0358. CORs and SECORs are issued through the applicable certifying partner.

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