CALGARY SAFETY CONSULTANTS

New Worker Follow-Up and Competency Record

For supervisors, buddies and new workers

How to use this record

Start this record on the worker's first day, right after the orientation checklist. It tracks the first 90 days: who the worker's buddy is, which tasks they can't do yet, what came up at each check-in, and when a competent person watched them do each task safely and signed it off.

- **Hold every check-in.** Put the one-week, 30-day and 90-day dates in the calendar on day one.
- **Sign off task by task.** A worker can be competent on one task and still in training on the next.
- **Watch before you sign.** Competency means you observed the task done safely under normal conditions, more than once.
- **Act on gaps.** If observation shows a worker can't do a task safely, give more training and observe again. B.C.'s s. 3.24 requires it, and it's good practice everywhere.
- **Record concerns.** Every concern a new worker raises goes in Part I, with what was done about it.

Key terms

Term	What it means
Competent	Alberta's OHS Act: adequately qualified, suitably trained and with sufficient experience to safely perform work without supervision or with only a minimal degree of supervision. Ontario's guide describes a competent supervisor as qualified because of knowledge, training and experience.
Buddy or mentor	An experienced, competent worker assigned by name to guide a new worker, answer questions and flag concerns.
Restricted task	A task the new worker must not do until they've been trained, observed and signed off.
Teach-back	Asking the worker to explain a task, its hazards and controls in their own words.
Close and competent supervision	Saskatchewan's s. 3-8(4) wording for supervision of a worker who isn't yet trained and experienced in the work.

Part A: Worker and assignment

Worker name

Position

Start date

Supervisor

Work site

Orientation completed

Worker type

- ☐ New hire
- ☐ Transfer or new task
- ☐ Returning
- ☐ Temporary or agency
- ☐ Young worker
- ☐ Seasonal

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.

Part B: Buddy or mentor assignment

Buddy / mentor name | **Position and years of experience** | **Phone**

Start date | **Planned end date** | **Approved by**

The buddy agrees to:

- ☐ Work alongside the new worker and be easy to reach for questions.
- ☐ Demonstrate tasks the way the company expects them done, and explain why each control matters.
- ☐ Stop the new worker from doing restricted tasks or taking shortcuts.
- ☐ Tell the supervisor about concerns, near misses or gaps in training.
- ☐ Take part in the one-week and 30-day check-ins.

Buddy signature | **Worker signature** | **Date**

Part C: Restricted tasks until sign-off

List the tasks, equipment and areas this worker must not do or enter until signed off in Part H. Share the list with the crew.

Task, equipment or area	Why restricted	Who may supervise	Date released	Released
				☐
				☐
				☐
				☐
				☐
				☐
				☐

Part D: First day check-in

Date | **Held by** | **Planned for (end of day one)**

- ☐ Worker knows their supervisor, buddy, muster point and how to report a hazard or injury.
- ☐ Orientation topics in Parts C1 to C6 of the checklist are complete and understood.
- ☐ Worker has the right PPE, and it fits.
- ☐ Worker knows which tasks are restricted.
- ☐ Asked: "What was confusing today?" and "Did anything feel unsafe?"

What the worker said, and actions agreed

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.

Part E: First week check-in

Date | **Held by** | **Planned for (end of week one)**

- [ ] Tasks done this week were demonstrated first and supervised.
- [ ] Buddy reports progress and any concerns.
- [ ] Worker can explain the hazards and controls of their main tasks (teach-back).
- [ ] Worker has used the hazard reporting or field-level hazard assessment process at least once.
- [ ] Asked: "What have you seen people do differently from what you were taught?"
- [ ] Remaining orientation topics and site-specific orientations scheduled.

What the worker said, and actions agreed

Part F: 30-day check-in

Date | **Held by** | **Planned for (about 30 days)**

- [ ] Task sign-offs in Part H are on track, and restricted tasks reviewed.
- [ ] Worker knows how to refuse unsafe work and would feel comfortable doing it.
- [ ] Near misses, incidents or first aid cases involving the worker reviewed.
- [ ] Buddy arrangement continued, changed or ended (record why).
- [ ] Asked: "What would make this job safer?"

What the worker said, and actions agreed

Part G: 90-day check-in

Date | **Held by** | **Planned for (about 90 days)**

- [ ] All tasks the worker does regularly are signed off as competent.
- [ ] Any remaining restricted tasks have a plan and date.
- [ ] Refresher or additional training needs identified and booked.
- [ ] Feedback on the orientation recorded so it can be improved.
- [ ] Worker asked what they would tell the next new worker.

What the worker said, and actions agreed

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.

Part H: Task competency sign-off

Sign off each task only after the steps are complete: **shown** by a competent person, **practised** under supervision, and **observed** done safely under normal conditions, more than once. Use the job hazard analysis or procedure as the standard.

Task	Procedure / JHA	Shown	Practised	Observed by	Date	Competent	Worker init.
		☐	☐			☐	
		☐	☐			☐	
		☐	☐			☐	
		☐	☐			☐	
		☐	☐			☐	
		☐	☐			☐	
		☐	☐			☐	
		☐	☐			☐	
		☐	☐			☐	
		☐	☐			☐	
		☐	☐			☐	

What a good observation looks for

Look for	Example
Follows the procedure	Every step in order, including the ones that slow the job down, such as lockout, a pre-use inspection or setting up a barricade.
Knows the why	Can explain what each control protects against, not just what to do.
Spots change	Recognizes when conditions differ from normal and stops to reassess or ask.
Uses PPE properly	Right PPE, worn and adjusted properly, inspected before use.
Consistent	Does it the same way when observed on different days, without prompting.

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.

Part I: Concerns raised by the worker

Record every safety concern the new worker raises, however small. New workers often see what everyone else has stopped noticing.

Date	Concern	Raised with	Action taken	Closed
				☐
				☐
				☐
				☐
				☐
				☐
				☐

Part J: Additional training and retraining

Use this when observation shows a task isn't done safely, when the worker asks for more training, or when a task or hazard changes.

Date	Task or topic	Reason	Trainer	Re-observed	OK
					☐
					☐
					☐
					☐
					☐

Part K: Records by jurisdiction

Jurisdiction	Record rule
British Columbia	Records of all orientation and training under ss. 3.23 and 3.24 (s. 3.25).
Manitoba	Record of all safety and health orientations provided to new workers.
New Brunswick	Records of orientation and training of new employees for at least three years (s. 8.2(5)).
Yukon	Records of all orientation and training under the Young and New Workers Code of Practice.
Ontario	Record of mandatory awareness training for each worker and supervisor, and of exemptions; written proof on request, including up to six months after they leave (O. Reg. 297/13 s. 4).
Federal	Employee and employer acknowledge each training in writing; keep the record 2 years after the employee stops being exposed to the hazard (COHSR s. 19.6).
All others	Keep orientation and competency records under your health and safety program; COR audits sample them.

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.

Worked examples

Situation	A good response
At the one-week check-in, a new worker says the crew skips the lockout step on a conveyor "because it only takes a second".	Thank the worker, record it in Part I, stop the practice and coach the crew. Check whether the procedure is realistic, and tell the worker what changed.
A transferred worker with ten years' experience asks to skip the task sign-off for a new loader.	Experience counts, but the equipment and site are new. Observe them on the new loader, which may take one shift, and sign off when they've shown it.
A supervisor wants to sign off a task the worker has only watched, never done.	Don't sign. Watching isn't practising. Let the worker practise under supervision, then observe them doing it safely before signing.
Observation shows a young worker can't operate the pallet jack safely in tight aisles.	Keep the task restricted, retrain and re-observe, and record it in Part J. In B.C., s. 3.24 requires additional training when observation shows a worker can't work safely.

Common follow-up mistakes

- Letting check-ins slide once the worker seems settled.
- Assigning a buddy who is too busy, or who teaches shortcuts.
- Signing off tasks from a classroom session or a video, without observing the work.
- Treating a restricted task list as a formality the crew doesn't know about.
- Not recording concerns, so the same hazard surprises the next new worker.
- Skipping the sign-off for experienced hires and transfers on new equipment or sites.

Part L: Final sign-off

Status at 90 days

- ☐ Orientation complete
- ☐ Restricted tasks remain (see Part C)
- ☐ All regular tasks signed off
- ☐ Further training booked

Worker	Signature	Date

Supervisor	Signature	Date

Manager	Signature	Record filed at

Want help? Calgary Safety Consultants helps employers set up competency programs, task sign-offs and supervisor training. Call 1-888-231-0358 or visit calgarysafetyconsultants.ca. Free guide: calgarysafetyconsultants.ca/safety-guides/safety-programs/new-worker-orientation/.

General information, not legal advice. Occupational health and safety requirements differ between provinces, territories and federally regulated workplaces, so adapt this form to your workplace and confirm the requirements that apply to you.