CALGARY SAFETY CONSULTANTS

Safe Work Procedure Template

For one specific task, step by step

How to use this template

Use this template to write a safe work procedure (SWP) for one specific task, usually a high-risk, complex or critical task that your hazard assessment or job hazard analysis has flagged. Write it with the workers who do the job, test it in the field, train everyone who uses it and review it whenever the work changes. Fill it in on screen or print it. A short worked example is on the last pages.

- **Sections 1 to 6** set up the procedure: header and approval, purpose and scope, hazards and controls, PPE, training and the tools, equipment and permits needed.
- **Section 7** is the heart of it: numbered steps in order, each with its hazards and controls. Start every step with a verb and put one action in each step.
- **Sections 8 and 9** cover emergency steps and references. **Section 10** records the field test before the procedure is issued.
- **Sections 11 and 12** record worker training and sign-off and every review, even when nothing changed.
- **Is this the right form?** If the task is a general type of work where the order of steps doesn't matter, write a safe work practice instead. See the companion practice vs procedure guide.

Key terms

Term	What it means
Safe work procedure	A written, step-by-step sequence for doing one specific task safely, from start to finish. Also called a safe job procedure, standard operating procedure or work instruction.
Safe work practice	General guidelines or rules for a type of work, written as do's and don'ts. The order of the rules doesn't matter.
Critical task	A task where a missed or out-of-order step could cause serious injury, illness or damage.
Control	A measure that eliminates or reduces a hazard, chosen by the hierarchy of controls: eliminate, substitute, engineering, administrative, PPE.
Field test	A trial in which a competent worker who didn't write the procedure follows it exactly at the real equipment while someone observes.

Section 1: Header and approval

Procedure title (the task)

Procedure no.

Version

Department or area

Site or location

Equipment, model or asset no.

Related JHA or hazard assessment no.

Related safe work practices

Province, territory or federal

Why this task needs a written procedure

- ☐ Critical or high-risk task
- ☐ Required by legislation
- ☐ Complex or infrequent task
- ☐ After an incident or near miss
- ☐ New equipment or process
- ☐ Inspection or audit finding

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Role	Name	Signature	Date
Written by			
Worker(s) consulted			
Committee or representative review			
Approved by (manager)			

Effective date

Next scheduled review date

Copies kept at

Section 2: Purpose and scope

Purpose: what this procedure is for

Scope: where and when it applies, and where it does not apply

Section 3: Hazard and control summary

Main hazards of this task

- ☐ Stored or hazardous energy
- ☐ Moving or rotating parts
- ☐ Pinch or crush points
- ☐ Sharp edges or blades
- ☐ Heavy loads or awkward lifts
- ☐ Chemicals or dusts
- ☐ Heat, cold or hot surfaces
- ☐ Electricity
- ☐ Pressure (hydraulic, air, steam)
- ☐ Falls from height
- ☐ Noise or vibration
- ☐ Mobile equipment or traffic
- ☐ Confined space
- ☐ Working alone
- ☐ Other

Main hazard	Control used	Level

Level: eliminate, substitute, engineering, administrative or PPE. Use the highest level that is reasonably practicable, and don't rely on this procedure where a guard, interlock or other engineering control is possible.

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Section 4: Personal protective equipment

PPE required for this task

- ☐ Hard hat
- ☐ Safety glasses
- ☐ Face shield
- ☐ Hearing protection
- ☐ Cut-resistant gloves
- ☐ Chemical gloves
- ☐ Safety footwear
- ☐ High-visibility vest
- ☐ Respirator (fit tested)
- ☐ Fall protection harness
- ☐ Fire-resistant clothing
- ☐ Other

When it must be worn (steps or areas)

Where it's kept

Section 5: Training and competency

Training required before doing this task alone

- ☐ Site orientation
- ☐ Task training with practical demonstration
- ☐ Lockout training
- ☐ WHMIS
- ☐ Confined space entry
- ☐ Fall protection
- ☐ Equipment operator authorization
- ☐ First aid
- ☐ Ticket or certification

Competency or authorization required	How it's verified	Verified by

Section 6: Tools, equipment and permits

Before starting, have these ready

- ☐ Personal lock and tag
- ☐ Group lockout box
- ☐ Safe work permit
- ☐ Hot work permit
- ☐ Confined space entry permit
- ☐ Gas monitor
- ☐ Barricades or signs
- ☐ Lifting device
- ☐ Manufacturer's manual
- ☐ Spill kit
- ☐ Radio or phone
- ☐ Other

Special tools, parts or other equipment

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Section 7: Steps in order

Write one action per step, starting with a verb (isolate, verify, remove, install, inspect). Name equipment by its label. Put warnings before the step they apply to. Add the step number of any photo or drawing. If you need more than 15 steps, consider splitting the task.

No.	Step: what to do (one action, verb first)	Hazards at this step	Controls and key points
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

Photos or drawings attached (list step numbers)

Number of pages attached

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Section 8: Emergency steps

Emergency number

First aider or contact

Radio channel or phone

First aid kit location

Eyewash or shower location

Fire extinguisher location

Muster point

Nearest hospital or emergency service

If something goes wrong during this task (for example, stored energy releases, a worker is caught or injured, a spill or fire): what to do, in order

Section 9: References

Documents referred to

- ☐ OHS legislation
- ☐ Related safe work practice
- ☐ Safety data sheet
- ☐ Manufacturer's manual
- ☐ Lockout or isolation list
- ☐ Company standard
- ☐ Job hazard analysis
- ☐ Permit or form
- ☐ Other

Titles, numbers or sections

Section 10: Field test record

Before issuing the procedure, have a competent worker who didn't help write it follow the draft exactly at the real equipment. Observe without coaching, and note every hesitation, question or step done differently.

Tested by (worker)

Observed by

Date

- ☐ The worker followed the steps exactly, in order, without coaching.
- ☐ Every piece of equipment, valve, switch and label named in the procedure matched what was at the work location.
- ☐ No steps were missing, and none were out of order.
- ☐ Warnings appeared before the steps they apply to.
- ☐ Photos and drawings match the current equipment.
- ☐ Emergency steps were realistic for the location.

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Problem found during the test	Change made to the procedure	Done
		☐
		☐
		☐
		☐

Ready to issue?

☐ Yes ☐ No, a second test is needed

Section 11: Worker training and sign-off

By signing, the worker confirms they were trained on this procedure, demonstrated the task and understand the hazards and controls.

Worker name	Trained by	Date	Demonstrated	Worker signature
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	

Section 12: Review log

Review triggers

☐ Scheduled review ☐ Equipment or process change ☐ Incident or near miss

☐ Worker concern or workaround ☐ Inspection or audit finding ☐ Change in law or manufacturer's instructions

Date	Reason for review	Changes made (or no change)	Reviewed by	New version

Remove old copies from every work location when a new version is issued, and retrain workers on what changed.

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Worked example: changing the blade on panel saw PS-2

This illustrative example shows the level of detail to aim for, with one action in each step. It has more than 15 steps because each one is a single action. It's not a procedure for your equipment. Always follow your manufacturer's instructions and your own lockout procedure.

Section	Example entry
Purpose and scope	Change the main blade on panel saw PS-2 safely. Applies to trained operators and maintenance staff. Doesn't cover scoring blade alignment.
Main hazards	Unexpected start-up, sharp blade, heavy blade (about 6 kg), pinch points at the blade flange, wood dust.
Controls	Lockout at disconnect DS-14, blade lock, cut-resistant gloves, blade carrier, dust extraction running before restart.
PPE	Safety glasses, cut-resistant gloves, safety footwear. Hearing protection for the test run.
Training	Lockout training, PS-2 operator authorization, practical demonstration signed off by the shop supervisor.

No.	Step	Hazard and control
1	Press the STOP button and wait for the blade to stop completely.	Coasting blade. Watch it stop; don't touch.
2	Open disconnect DS-14 on the east wall.	Unexpected start-up. Isolate at the disconnect, not the start button.
3	Apply your personal lock and a completed danger tag to DS-14.	Others restarting the saw. One lock per worker.
4	Press START to verify the saw won't run.	Isolation failure. If it moves, stop and call the supervisor.
5	Press STOP to return the control to off.	Start-up when locks come off. Controls back to off.
6	Put on cut-resistant gloves.	Cuts from the blade teeth.
7	Open the blade guard.	Sharp teeth exposed. Keep hands clear of the teeth.
8	Engage the blade lock.	Blade turning while loosening the nut.
9	Loosen the arbor nut with the PS-2 wrench (left-hand thread).	Hand slipping onto teeth. Pull the wrench away from the blade.
10	Remove the old blade with the blade carrier.	Heavy, sharp blade. Use the carrier.
11	Store the old blade in the rack.	Cuts. Teeth facing in.
12	Install the new blade with teeth pointing toward the operator side.	Wrong direction. Check the arrow on the blade.
13	Tighten the arbor nut.	Loose blade. Check the nut is tight.
14	Release the blade lock.	Blade can't turn freely if left on.
15	Close the blade guard.	Exposed blade. Guard must be fully closed.
16	Confirm everyone is clear of the saw.	Others near the blade on restart.
17	Remove your lock and tag from DS-14.	Only the worker who applied a lock removes it.
18	Close disconnect DS-14.	Energy restored. Stand clear.
19	Run the saw for 30 seconds and listen for vibration or noise.	Faulty install. Stop and lock out again if found.

Emergency: if a worker is cut, apply pressure, call the first aider on radio channel 2 and 911 for serious bleeding. First aid kit beside the panel saw.

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Writing tips and common mistakes

- Write the procedure with the workers who do the job, at the real equipment, not at a desk.
- Avoid vague steps such as "make sure it's safe" or "use caution"; say exactly what to do and check.
- Don't put several actions in one step; long steps hide the action that gets missed.
- Fix the hazard first where you can; a procedure is an administrative control, not a substitute for a guard.
- Don't skip the field test, the practical demonstration or the sign-off.
- Keep only the current version at the work location, and review it whenever the work changes.

Free guide. Read How to Write a Safe Work Procedure at calgarysafetyconsultants.ca/safety-guides/hazard-management/safe-work-procedure/. Questions? Call Calgary Safety Consultants at 1-888-231-0358.

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