

SECOR evaluations sample records from across the whole year, so a missing month can't be fixed after the fact. Set Month 1 as the first month of your 12-month period (usually the 12 months before your SECOR evaluation), name an owner for each record type, and tick the box once that month's records are complete and filed. Use the monthly review log on the last page to catch gaps early. Edit the record list to match your certifying partner's audit tool. There's also an Excel version that adds up your progress automatically.

Company	Certifying partner	Month 1 (month and year)	Month 12 (month and year)	Evaluation date

Record	How often	Owner	MONTH (TICK WHEN COMPLETE)											
1	2	3	4	5	6	7	8	9	10	11	12			
Policy and responsibilities														
Signed health and safety policy, reviewed and communicated	Annually		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Owner and supervisor responsibilities known and acknowledged	As roles change		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Hazard assessment and control														
Formal hazard assessments reviewed or updated	As work changes		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Field-level hazard assessments completed and signed	Daily or each job		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Safe work practices reviewed with workers	As scheduled		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
PPE checked and replaced as needed	Monthly		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Inspections and equipment														
Planned inspections of shop, sites and vehicles	Monthly		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Pre-use equipment and vehicle checks	Daily or before use		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Equipment maintenance records	As scheduled		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Corrective actions tracked and closed	Monthly		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Orientation and training														
Orientation for every new worker	Each new worker		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Training records and tickets kept current	As training occurs		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Record	How often	Owner	MONTH (TICK WHEN COMPLETE)											
			1	2	3	4	5	6	7	8	9	10	11	12
Worker participation														
Safety meetings or toolbox talks with attendance	Weekly or monthly		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Worker concerns raised and answered	As they occur		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Emergency response														
Emergency plans current for each site	As sites change		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
First aid kit checks	Monthly		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Emergency drill with lessons learned	At least annually		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Incident reporting and investigation														
Incident and near-miss reports	As they occur		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Investigations with causes and corrective actions	As they occur		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Program review														
Annual program review	Annually		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Last evaluation action items closed	Monthly		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Your own records (match your certifying partner's audit tool)														
			☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
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			☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Once a month, check the tracker with the people who own each record type. Note any missing or partial records, the reason and what you're doing about it, so the same gap doesn't show up the next month.

Month	Reviewed by	Date	Gaps found	Action taken and owner
Month 1				
Month 2				
Month 3				
Month 4				
Month 5				
Month 6				
Month 7				
Month 8				
Month 9				
Month 10				
Month 11				
Month 12				

Want a second set of eyes? Calgary Safety Consultants can review your records and SECOR evaluation before you submit it. We help employers prepare; CORs and SECORs are issued through the applicable certifying partner. Read the guide at calgarysafetyconsultants.ca/safety-guides/cor-secor/secor-evaluation/ or call 1-888-231-0358.