

# PRE-TASK PLANNING (PTP) ASSESSMENT CHECKLIST

**Pre-Task Planning (PTP)** is a process performed before each task starts to discuss the steps of work, the hazards, and available controls. This process may also be known as JHA, JSA, morning huddle, etc.

**This checklist** has been developed based on research findings and input from industry experts to help construction practitioners evaluate and improve their PTP process. Each “No” answer indicates an area for improvement. **Please note** that this checklist is not a replacement for your PTP.



Please use the QR code above or go to <http://bit.ly/3Fh4ehN> if you have any feedback or questions.

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| 1. Do you conduct PTP before each task starts?   | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 2. Do you conduct daily walkthroughs to get a better understanding of the current site conditions?<br>→ If you answered <b>NO</b> , please skip to <b>question 3</b> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| a. Are workers involved in daily walkthroughs?   | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 3. Do you update PTP content when conditions change?<br>→ If you answered <b>NO</b> , please skip to <b>question 4</b>   | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| a. Do you communicate these changes with workers immediately?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 4. Does your PTP break the task up into manageable steps or sub-tasks?   | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 5. Does your PTP specify hazards associated with each step of the task?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 6. Does your PTP discuss ways to control each hazard?<br>→ If you answered <b>NO</b> , please skip to <b>question 7</b>  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| a. Does your PTP identify who is responsible for implementing the controls?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 7. Does your PTP discuss hazards posed by other crews working close by?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 8. Do you provide any formal training to conduct or lead the PTP meeting?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 9. In addition to the crew supervisor, do workers have the opportunity to lead the PTP meeting?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 10. Do you gather workers' feedback on PTP content and delivery?<br>→ If you answered <b>NO</b> , please skip to <b>question 11</b>                                  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| a. Do you incorporate their feedback?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 11. Does your PTP use photos or other visual aids instead of text where possible?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 12. Do you use educational aids like a whiteboard or live demonstration in your PTP process?   | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 13. Does your PTP include supplemental information such as:  |  |
| a. Site layout?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| b. Medical facility location and contact information?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| c. Evacuation plan and muster point for emergencies?   | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| d. Work schedule?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| e. Tools?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| f. Equipment?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| g. Materials?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| h. Specific types of PPE?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 14. Do you conduct end-of-shift review with your crew to discuss what went well and what didn't?   | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| 15. Is PTP information easily accessible to workers after the meeting is completed?  | Yes <input type="checkbox"/> No <input type="checkbox"/> |