

Pre-Task Planning (PTP) Assessment Management 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/4535TS8> if you have any feedback or questions.

1.	Do you conduct PTP before each task starts? ➔ If you answered NO , please use CPWR's PTP Guidelines to initiate your process and then use this checklist to assess it.	Yes	No
2.	Do you conduct daily walkthroughs? ➔ If you answered NO , please skip to question 3	Yes	No
	a. Are workers involved in daily walkthroughs?	Yes	No
3.	Do you update PTP content when conditions change? ➔ If you answered NO , please skip to question 4	Yes	No
	a. Do you communicate these changes with workers immediately?	Yes	No
4.	Does your PTP break the task up into manageable steps or sub-tasks?	Yes	No
5.	Does your PTP specify hazards associated with each step of the task?	Yes	No
6.	Does your PTP discuss ways to control each hazard? ➔ If you answered NO , please skip to question 7	Yes	No
	a. Does your PTP identify who is responsible for implementing the controls?	Yes	No
7.	Do you inform workers about permit requirements during the PTP meeting?	Yes	No
8.	Does your PTP discuss hazards posed by other crews working nearby?	Yes	No
9.	In addition to the crew supervisor, do workers have the opportunity to lead the PTP meeting?	Yes	No
10.	Do you provide any training to conduct or lead the PTP meeting?	Yes	No
11.	Do you gather workers' feedback on PTP content and delivery? ➔ If you answered NO , please skip to question 12	Yes	No
	a. Do you incorporate their feedback?	Yes	No
12.	Does your PTP use photos or other visual aids instead of text where possible?	Yes	No
13.	Do you use educational aids like a whiteboard or live demonstration in your PTP process?	Yes	No
14.	Does your PTP include the following information?	Yes	No
	a. Site layout	Yes	No
	b. Medical facility information	Yes	No
	c. Evacuation and emergency plans	Yes	No
	d. Work schedule	Yes	No
	e. Tools	Yes	No
	f. Equipment	Yes	No
	g. Materials	Yes	No
	h. Specific types of PPE	Yes	No
15.	Is PTP information easily accessible to workers after the meeting is completed?	Yes	No
16.	Do you conduct end-of-shift review with your crew to discuss what went well and what didn't?	Yes	No