

Occupational health and safety starter kit



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About the starter kit

This starter kit is designed for small or medium employers at single-employer work sites. It provides information and tools that can help you build an occupational health and safety system from the ground up, or grow and improve your existing health and safety culture and performance.

This starter kit also introduces some health and safety basics that apply to most industries. Where applicable, specific provisions from occupational health and safety laws are presented – but note that **not all requirements under the *Occupational Health and Safety Act, Regulation and Code* are included in this kit.** To ensure you know all the requirements that apply to you and your industry, consult the occupational health and safety laws directly.

How to use this starter kit

The document is divided into six tabbed sections.

Introduction begins with the concept of the internal responsibility system, which is the foundation of health and safety law. This section also describes the general duties of employers, supervisors and workers; the health and safety rights of workers; and the role and authorities of Alberta Occupational Health and Safety officers.

Health and safety leadership gives some suggestions about how to demonstrate commitment and build your workplace health and safety culture.

Worker participation introduces legal requirements to involve workers in health and safety. Some of these apply regardless of the number of workers employed. Other requirements – for health and safety committees, or health and safety representatives – apply when an employer regularly employs specific numbers of workers: 20 or more, or five to 19 workers, respectively.

Health and safety program provides a high level overview of health and safety program requirements. These apply to employers who regularly employ 20 or more workers.

Health and safety topics introduces fundamentals that are required at most work sites. As we say above, other requirements may apply to your work site and industry – always consult the occupational health and safety laws to know what applies to you and your work.

Examples, thinking points, templates and sample forms are provided throughout.

Additional resources are listed at the end of this starter kit.

Introduction

The internal responsibility system

Occupational health and safety legislation relies on the foundation of the internal responsibility system. An internal responsibility system is a way of sharing responsibility for health and safety between everyone in the workplace. Responsibility is shared according to each person's legal obligations, which are often based on that person's authority and control at the work site.

The intent behind the internal responsibility system is to address workplace hazards quickly, effectively and internally. When everyone adopts good health and safety practices as part of their regular workplace routine, health and safety standards can be met without external enforcement. Individuals must do their part in ensuring health and safety at work, even when no one is looking.

Workplace health and safety is a team effort. For the system to work, everyone must know – and do – what's expected of them in their role.



Introduction

General duties

Alberta has laws in place to make sure all work site parties take occupational health and safety seriously. This is about preventing workplace-related illnesses, injuries and deaths. It's a serious subject.

Regulated work site parties are defined in the *Occupational Health and Safety Act*. They are:



employers



supervisors



workers



suppliers



service providers



owners



contracting
employers



prime
contractors



temporary staffing
agencies

Work site means a location where a worker is, or is likely to be, engaged in any occupation and includes any vehicle or mobile equipment used by a worker in an occupation.

Part 1 of the *Occupational Health and Safety Act* sets out the general duties of each regulated work site party. The next three pages of this starter kit introduce the general duties of employers, supervisors and workers. But remember:

- All regulated parties have obligations under the occupational health and safety laws.
- Legal obligations for work site parties are found throughout the act and Occupational Health and Safety Code.
- It is possible to fall under more than one work site party category. In this case, the requirements related to each role apply to that person. For example, a supervisor is also a worker, with the same rights and obligations as a worker.

Know what's expected of you in your role or roles. And know what you have the right to expect from others. Learn more in *Guide to OHS: Employers*, *Guide to OHS: Supervisors* and *Guide to OHS: Workers* in **Additional resources** (Introduction).



An employer is:

- A self-employed person.
- A person who employs or engages one or more workers, including workers from a temporary staffing agency.
- A designated employer representative.
- A person responsible for overseeing workers' health and safety within an organization.

As an employer, your general duties are **to ensure:**

- Your workers are trained to perform their work in a healthy and safe manner.
- Only competent workers, or workers supervised by competent workers, carry out dangerous work.
- Health and safety information – describing hazards, controls, work practices and procedures – is readily available to workers and (if applicable) the health and safety committee or representative, or a prime contractor.
- Occupational health and safety legislation is readily available at your site.
- You co-operate with any person exercising a duty under the occupational health and safety laws.

Your general duties also include **doing everything reasonably practicable to ensure:**

- The health, safety and welfare of workers.
- The health and safety of other persons at or in the vicinity of the work site.
- Your workers know their rights and responsibilities under the occupational health and safety legislation.
- Your workers are not subject to and don't participate in workplace harassment or violence.
- Your supervisors are competent and know occupational health and safety requirements that apply to the work.
- The health and safety committee or representative – if either are required – comply with their legislated requirements.
- You resolve health and safety concerns in a timely manner.



Supervisor

A supervisor is a person who has charge of a work site or authority over a worker.

Supervisors' general duties are to:

- Protect the health and safety of workers under their supervision.
- Prevent workers under their supervision from participating in, or being subjected to, workplace harassment and violence.
- Tell workers under their supervision about all known or possible hazards in the work area.
- Ensure workers under their supervision follow legislated occupational health and safety responsibilities.
- Report health and safety concerns to the employer.
- Co-operate with any person exercising a duty under the occupational health and safety laws.

Note that it is the authority of their position that defines a supervisor, not their job title – and depending on the organization and type of work site, a supervisor may go by another name. There are many examples; a few are charge nurse, director, foreman, lead hand, manager, and team lead.





Worker

A worker is any person engaged in an occupation – even if they perform services for an organization or employer without being paid, or are working from home for an outside employer.

A person is not a worker under the *Occupational Health and Safety Act* if they are:

- A student engaged in their studies, without any payment.
- The owner, their family member or an unwaged person working on certain farming and ranching operations.
- A person doing tasks for their own business, or personal work – such as household chores or repairs – in, to or around their home.

Workers' general duties are to:

- Take reasonable care to protect their own and others' health and safety.
- Co-operate with their employer or supervisor for the purposes of health and safety.
- Wear required personal protective equipment and use required health and safety devices or equipment.
- Refrain from causing or participating in harassment and violence.
- Report concerns about unsafe or harmful work site acts or conditions to their employer or supervisor.
- Participate in health and safety training.
- Co-operate with any person exercising a duty under the occupational health and safety laws.

Workers must not perform work that may endanger themselves or others unless they are either competent to do so or are working under the direct supervision of a worker who is competent in that work.



The *Occupational Health and Safety Act* and specific provisions of the Occupational Health and Safety Code apply to waged, non-family workers in a farm and ranch operation. For more information, visit alberta.ca/farm-and-ranch-ohs.

As well, the act and certain provisions of the code apply to domestic workers. Read more in the *Domestic workers* bulletin in **Additional resources** (Introduction).

The three fundamental health and safety rights of workers

The *Occupational Health and Safety Act* gives workers specific rights:

- **The right to know.**
- **The right to participate.**
- **The right to refuse dangerous work.**

Employers need to be aware of workers' rights and responsibilities under the internal responsibility system. They also need to make sure their workers know about them.



Every employer shall ensure, as far as it is reasonably practicable for the employer to do so, ... that the workers engaged in the work of that employer are aware of their rights and duties under this Act, the regulations and the OHS Code.

Occupational Health and Safety Act, Part 1, Section 3(1)(b)



The right to know

Workers have the right to know about workplace hazards and to have access to health and safety information at the work site.

The employer must share information about hazards at the work site, controls used to eliminate or control the hazards, and any relevant work practices and procedures with the health and safety committee or representative (as applicable) and workers. **Supervisors also play an important role in sharing information.** This includes carrying out their general duty to advise the workers they supervise about any known or reasonably foreseeable hazards in their work area.

Access to current occupational health and safety legislation at work is part of a worker's right to know. It's the employer's responsibility to ensure access.



- 3(4) Every employer shall keep readily available information related to work site hazards, controls, work practices and procedures and provide that information to
 - (a) the joint health and safety committee, if there is one, or health and safety representative, if there is one, at the work site,
 - (b) the workers, and
 - (c) the prime contractor, if there is one.
- 3(5) Every employer shall ensure that current paper or downloaded or stored electronic copies of this Act, the regulations and the OHS code are readily available for reference by workers, the joint health and safety committee, if there is one, and the health and safety representative, if there is one.

Occupational Health and Safety Act, Part 1, Section 3(4-5)



- 4(b) Every supervisor shall ... advise every worker under the supervisor's supervision of all known or foreseeable hazards to health and safety in the area where the worker is performing work.

Occupational Health and Safety Act, Part 1, Section 4(b)

The right to participate

Workers have the right to meaningful participation in health and safety activities related to their work and the work site.

All employers must involve affected workers in hazard assessment and control, emergency response planning, violence and harassment prevention, and developing and implementing certain safe work practices.

Health and safety committees or representatives provide additional opportunities for worker participation in health and safety. Refer to the *Worker participation* section of this starter kit to learn more about these.

Workers must be able to express health and safety concerns without fear of disciplinary action. Remember, reporting any health and safety concerns is both a right and part of a worker's general duties under the *Occupational Health and Safety Act*.



No person shall take any disciplinary action against a worker by reason of that worker acting in compliance with this Act, the regulations, the OHS Code or an order issued under this Act.

Occupational Health and Safety Act, Part 3, Section 18

The right to refuse dangerous work

Workers have the right to refuse to do work they believe presents an **undue hazard** to their health and safety or the health and safety of others at the work site.

Since workers must take reasonable care to protect the health and safety of themselves and others at the work site, workers may have an obligation to refuse dangerous work.

An undue hazard is a serious and immediate threat to health and safety that the refusing worker actually observes or experiences at their work site.

Section 17 of the *Occupational Health and Safety Act* describes the steps that employers and workers must follow in the work refusal process. **These steps are obligations for both work site parties.** Learn more in the *Right to refuse dangerous work* bulletin in **Additional resources** (Introduction)



If you have questions about how to handle a worker's refusal to do work they think is unsafe, call the **OHS Contact Centre**.

1-866-415-8690 (toll-free in Alberta) | 780-415-8690 (in Edmonton and surrounding area)

The role of Alberta OHS officers

Alberta Occupational Health and Safety (OHS) is the part of the provincial government that administers and enforces Alberta's occupational health and safety laws.

OHS officers conduct work site inspections and investigations throughout Alberta. Their job is to make sure work site parties are meeting the legislated requirements of occupational health and safety legislation. **These officers have the legal authority to enforce the law.**

During an inspection, officers may:

- Enter a work site at any reasonable time.
- Require the production of any documents relating to health and safety. The officer can:
 - Examine these, make copies or temporarily remove them to make copies.
 - Use any of the employer's devices or systems, if needed, to examine the documents.
- Require reasonable assistance, including access to electronic information.
- Inspect, seize or take samples of materials, products or equipment.
 - This can include requiring dismantling or testing, if needed.
- Bring along specialized equipment and technical experts.
- Do tests and take photographs, measurements or recordings.
- Require demonstrations of how equipment or machinery works.
- Interview and take statements from people who have information related to the health and safety of workers.



No person shall interfere with or in any manner hinder an officer or a police officer who is exercising powers or performing duties or functions under this Act.

Occupational Health and Safety Act, Part 7, Section 37

In the course of carrying out their duties, **OHS officers are expected to act according to their published professional standards**, *Integrity in enforcement – Professionalism in the workplace*. These standards – as well as bulletins on the *Role and duties of Alberta OHS officers* and *What to expect in an OHS inspection* – are listed in **Additional resources** (Introduction).

Enforcing compliance

Occupational health and safety legislation is in place to help keep Alberta work sites healthy and safe for everyone. It can only be effective if everyone co-operates. **Voluntary co-operation with the law is in everyone's best interest.**

When the internal responsibility system fails and an employer, supervisor, worker or other work site party breaks the rules, they endanger themselves and others present at the work site. That's not acceptable.

Alberta OHS officers can take a range of actions to enforce compliance with legislation.

Orders

Orders require work site parties to take measures that address health and safety concerns.

There are different types of orders:

- **Compliance orders** mandate work site parties to meet their legislated obligations, and require measures and timelines for compliance.
- **Stop use orders** require certain work site parties to stop using personal protective equipment, other equipment, harmful substances or explosives if they are unsafe or do not comply with occupational health and safety laws.
- **Stop work orders** can be used if officers believe there is a danger to worker health and safety. Stop work orders can apply to specific activities or areas of a work site, to an entire work site, or to multiple work sites of a single employer. An OHS officer may also require any person to leave the work site if it is dangerous for that person to remain, and order measures required to remove the danger or to protect any person from the danger.



Tickets

Tickets deliver an on-the-spot consequence to employers, supervisors and workers who are caught breaking specific provisions of the Occupational Health and Safety Code. Ticket amounts range from \$100 to \$500 per violation. A 20 per cent victim surcharge is applied to each ticket.

Occupational health and safety tickets use the same form as Alberta traffic tickets. The form describes how to pay or contest the ticket, and gives a court date and location.

For more information, visit [**alberta.ca/ohs-violation-tickets**](https://alberta.ca/ohs-violation-tickets).

Administrative penalties

Administrative penalties can be issued for contravening occupational health and safety legislation. Administrative penalties can also be issued for failing to comply with an order, acceptance, allowance or approval, or inter-jurisdictional recognition, or for making a false statement or giving false or misleading information to an officer.

Administrative penalty amounts are a maximum of \$10,000 per day per contravention and are determined on a case-by-case basis.

For more information, visit [**alberta.ca/ohs-administrative-penalties**](https://alberta.ca/ohs-administrative-penalties).

Prosecution

A work site party who breaks the rules of the *Occupational Health and Safety Act* or the Occupational Health and Safety Code, or commits other offences listed in the act, can be charged.

Conviction on a first offence can lead to a fine of up to \$500,000, plus \$30,000 each day an offence continues and/or a jail term of up to six months per violation.

A second offence can result in a fine of up to \$1,000,000 plus \$60,000 each day an offence continues and/or a jail term of up to one year per violation.

For more information, visit [**alberta.ca/ohs-investigations**](https://alberta.ca/ohs-investigations).

Health and safety leadership

Building a health and safety culture

Generally, the stronger an organization's health and safety culture is, the better its related performance. A healthy and safe organization is a productive organization.

The benefits of a strong health and safety culture can include:

- Improvements in day-to-day operations.
- Ownership of health and safety initiatives.
- Willing participation in those initiatives.
- A more consistent, efficient and effective workplace.
- Good worker morale.
- Lower operating costs.

In this section, let's look at some ways that you, as an employer, can build or strengthen your organization's health and safety culture.



Health and safety leadership

Lead by example

Commitment to health and safety has to start at the top. As an employer, you should take every possible opportunity to show your commitment by becoming actively involved.

Workers need to see their leaders making health and safety a priority. This means talking about health and safety regularly, encouraging workers to do the same, and then doing something good with what comes out of these talks. Actions always speak louder than words.

Employers have to lead. You also have to follow through by listening to workers' concerns and investing the resources necessary to improve health and safety for everyone on the job.

Here's a quick self-check. **Customize the questions to suit your organization**, and then answer them. The completed, customized checklist may be an indicator of your commitment to good health and safety practices.



How do you think you're doing?

YES NO

Do you have a health and safety policy?

☐☐

Do you set health and safety goals, assign responsibilities and hold people accountable for them?

☐☐

Is your health and safety committee or health and safety representative (as applicable) active and engaged?

☐☐

Do you hold yourself accountable for all your health and safety responsibilities?

☐☐

Is health and safety frequently discussed at meetings?

☐☐

Are your workers given the opportunity to express their concerns?

☐☐

Do workers feel comfortable expressing their concerns?

☐☐

Do you follow up on the concerns raised by your workers?

☐☐

Do you enforce proper work procedures regardless of how busy people are?

☐☐

Does your operating budget include a line item for health and safety?

☐☐

Do you take an active role in all aspects of your health and safety culture?

☐☐

Would your workers agree with all of your answers above?

☐☐

Commit to spreading the word

Information that promotes health and safety at your work site is information that everyone at your work site needs to know.

Employers should figure out the best and most effective ways to get health and safety messages out and solicit worker feedback and suggestions.

Staying alert to everyday workplace hazards can be a challenge, particularly in jobs where the hazards may be less obvious and where busy work is often the routine.

Talking about workplace health and safety is a good idea. For example, you may want to put it on the agenda for staff meetings. Open discussion can stir up new ideas or remind everyone of details they may have forgotten. It prompts awareness and helps remind everyone to stay alert.

Since people absorb information or learn in different ways, it's best to communicate health and safety information in a variety of formats. Some examples are:



an agenda item at
staff meetings



toolbox talks/
tailgate meetings



take-away formats
(e.g. newsletters, paycheque
inserts, pamphlets)



posters in
staff rooms



digital bulletin boards,
emails, intranet website

Promote consistency in health and safety goals and messaging by working with your **health and safety committee or representative**, if applicable.

Health and safety policy

A health and safety policy represents an employer's intent to protect and maintain the health and safety of an organization's workers as well as others at the work site. It outlines the measures that are in place to maintain health and safety, and it's a critical step in demonstrating management's commitment.

As a best practice, a health and safety policy should include:

- The employer's **commitment** to health and safety.
- The organization's health and safety **goals**.
- The **responsibilities** of all work site parties.

Once someone with authority at the top of an organization has signed the policy, **it needs to be shared with workers and others at the work site**. Make it public, promote it, and keep it top of mind for everyone.

A sample health and safety policy is provided on the next two pages for your reference.

Health and safety policy (sample)

This is one example of a health and safety policy. You can find a Microsoft Word version of this sample policy in *Occupation health and safety starter kit: template package* in **Additional resources** (General). **If you choose to use this sample, make sure you customize it to your work and work site.**

Employer name:

Company health and safety policy

<Employer name> is committed to a health and safety program that protects and maintains the health and safety of workers at our work sites. This company is also committed to protecting and maintaining the health and safety of others in our workplace, including contractors that we engage, other workers at the work site, and the general public.

The employer, supervisors and workers at <employer name> are responsible and accountable for the company's health and safety performance. Active participation by everyone, every day is necessary for the health and safety excellence that we expect.

At <employer name>, our goal is a healthy, injury-free workplace. By working together, we can achieve this goal.

The employer will ensure:

- The health, safety and welfare of workers at the work sites.
- The health and safety of other persons at or near the work site, who may be affected by hazards from our work sites.
- Workers are aware of their occupational health and safety rights and duties.
- Workers are not subjected to, and don't participate in, workplace harassment or violence.
- Supervisors are competent, and familiar with occupational health and safety laws.
- Workers have the training they need to work in a healthy and safe manner.
- Dangerous work is only carried out by a competent worker, or a worker who is working under direct supervision of a competent worker.
- The health and safety committee complies with their legislated requirements.
- Health and safety concerns are resolved in a timely manner.
- Information related to work site hazards, controls, work practices and procedures is readily available to workers, the health and safety committee and the prime contractor.
- Current occupational health and safety legislation is readily available to workers and the health and safety committee.

Supervisors will:

- Take all precautions necessary to protect the health and safety of every worker under their supervision, and ensure that those workers:
 - Follow procedures and measures required by occupational health and safety legislation.
 - Are not subjected to and don't participate in workplace harassment or violence.
- Advise every worker they supervise about all known or reasonably foreseeable hazards to health and safety in their work area.
- Report health and safety concerns to the employer.

Workers will:

- Protect their own health and safety, as well as that of other people at or near the work site.
- Co-operate with their supervisors and employer to protect their own and others' health and safety.
- Use all devices and wear all personal protective equipment required by the employer or the *Occupational Health and Safety Act* or Code.
- Refrain from causing or participating in workplace harassment or violence.
- Report health and safety concerns to the employer or supervisor.
- Participate in any training provided by the employer.
- Not perform work that may endanger themselves or others, unless they are competent to do so or directly supervised by a worker who is competent to perform the work.

In addition, the **employer, supervisors** and **workers** will:

- Co-operate with any person exercising a duty imposed by the *Occupational Health and Safety Act* or Code.
- Comply with the *Occupational Health and Safety Act* and Code, and any work site policies, procedures and codes of practice.

Other **parties** (for example, **contractors, suppliers, or service providers**) are expected to comply with the *Occupational Health and Safety Act* and Code, and our policies, while at our work site. <employer name> will address any health and safety issues relating to another party on site.

Workers at every level must be familiar with the requirements of Alberta occupational health and safety legislation as it relates to their work.

Signed: <signed by the highest level of management> **Date:**

This form is for example purposes only. Completing this form alone will not necessarily put you in compliance with the legislation. It is important and necessary that you customize this document to meet the unique circumstances of your work site. Further, it is essential that this document is not only completed, but is used, communicated and implemented in accordance with the legislation. Neither the Crown, nor its agents, employees or contractors, will be liable to you for any damages, direct or indirect, arising out of your use of this form.

Worker participation

Provide opportunities

Employers of any size must provide opportunities for worker participation. Some requirements to involve or consult affected workers apply regardless of the number of workers you employ.

As well, depending on the total number of workers you regularly employ, **your organization may be required to have a health and safety committee or representative.**

The requirements to involve or consult affected workers, and for health and safety committees and representatives, are introduced in this section.

Note that if you're not required to do so, you can still put a health and safety committee or representative in place – and if you choose to do so, your organization can establish its own processes and rules. The rules about health and safety committees and representatives only apply when those are required under the occupational health and safety legislation.

A voluntary health and safety committee can exist alongside, but can't replace, a required health and safety representative (unless the committee follows legal requirements per Section 14(6) of the *Occupational Health and Safety Act*).





Involve/consult affected workers

A number of provisions in the Occupational Health and Safety Code require employers to ensure workers participate in certain specific activities. These requirements apply regardless of the number of workers you employ.

Some requirements for worker participation – such as the examples below – apply broadly, no matter the type of work site, work activities or industry. Other provisions in the code that require worker participation are more specific. As always, make sure you know the requirements that apply to your work site, work activities and industry.



An employer must involve affected workers in the hazard assessment and in the control or elimination of the hazards identified.

Occupational Health and Safety Code, Part 2, Section 8(1)



An employer must involve affected workers in establishing the emergency response plan.

Occupational Health and Safety Code, Part 7, Section 115(2)



When developing and implementing a violence and harassment prevention plan, an employer must consult with ... affected workers, as far as reasonably practicable to do so, if there is no joint health and safety committee or health and safety representative.

Occupational Health and Safety Code, Part 27, Section 390(2)(c)



When carrying out the review required by subsection (1), the employer must consult with ... affected workers, as far as reasonably practicable to do so, if there is no joint health and safety committee or health and safety representative.

Occupational Health and Safety Code, Part 27, Section 390.7(2)(c)

Read more in *Participation in health and safety for small business owners and workers* in **Additional resources** (Worker participation).

Health and safety committees and representatives

Threshold requirements for committees and representatives are as follows:

		
An employer with 1 – 4 regularly employed workers has no legal requirement for a health and safety committee or representative.	An employer with 5 – 19 regularly employed workers must have a health and safety representative.	An employer with 20 or more regularly employed workers must have a health and safety committee.

The Occupational Health and Safety Regulation states that for the purpose of determining if a health and safety committee or representative is required, **unwaged workers (volunteers) are not included in the count of regularly employed workers.**

Volunteers are workers with the same rights and protections under occupational health and safety legislation. Although they don't count as regularly employed when determining if a health and safety committee or representative is required, **volunteers can still serve as a health and safety committee member or as a health and safety representative.**

Note that under the *Occupational Health and Safety Act*, an Alberta OHS director can order a health and safety committee or representative at any work site.

As well, health and safety committee and representative requirements may apply on work sites with multiple employers. Read *Health and safety committees and representatives* in **Additional resources** (Worker participation) to learn more.

Where do I find health and safety committee or representative rules?

Part 2 of the act, Part 13 of the code

The basic rules for health and safety committees and representatives are in Part 2 of the *Occupational Health and Safety Act*. Part 13 of the Occupational Health and Safety Code gives further direction.

Requirements from Part 2 of the act and Part 13 of the code are summarized in the next pages. But as always, make sure you consult the laws directly to know all the rules that apply to you.

Other provisions in the act

As described on page 5, several of your general duties as an employer involve the health and safety committee or representative (if your organization is required to have one). There are also right to refuse dangerous work and incident investigation requirements that involve health and safety committees or representatives. Refer to page 10 to read about work refusals; and to page 79 to learn about incident reporting and investigation.

Other provisions in the code

Provisions of the Occupational Health and Safety Code – **outside of Part 13** – that involve health and safety committees and representatives are:

- Section 22(3) requires employers to inform the health and safety committee or representative about worker overexposures in writing.
- Sections 390(2) and 390.7(2) set out requirements to consult the health and safety committee or representative in developing, implementing, and reviewing an employer's violence and harassment prevention plan.
- Section 397(2) requires health and safety committee or representative involvement in developing and implementing certain procedures related to hazardous products.
- Sections 407 and 411(1) ensure health and safety committee or representatives have access to safety data sheets and, in the case of an employer who manufactures a hazardous product, toxicological data.



Health and safety representative

A health and safety representative is an individual worker who works with the employer to address health and safety concerns. The role is to advise and assist. A health and safety representative does not assume or replace managerial responsibilities for health and safety in the workplace.

Under the *Occupational Health and Safety Act*, employers designate a health and safety representative. **The health and safety representative must be a worker** – not someone in a supervisory or management position, or a contracted service provider.

There are different ways to select a health and safety representative. Here are some examples:

- Invite workers to consider taking on the role.
- Set up a nomination process and hold a secret ballot among workers.
- If no one volunteers, the employer can nominate someone.
 - Make sure anyone who is nominated is willing to assume the responsibilities.
 - Make sure the workers somehow demonstrate that they accept this person to represent them.

Employers must consult with unions representing their workers before putting a required health and safety representative in place.

Workers and other parties at the work site need to be able to contact their health and safety representative with any concerns or questions. **The employer must post how to contact the health and safety representative at all applicable work sites** (or share that information by a different method, if the health and safety representative agrees). Employers must keep a record of the health and safety representative's name and contact information.

Health and safety representatives can call special meetings with an employer to deal with health and safety concerns at the work site.

OHS officers may ask the health and safety representative to accompany them on inspections.

A health and safety representative takes on all the core duties of a health and safety committee (with necessary modifications).



Health and safety committee

The core duties of a health and safety committee are set out in Section 13(6) of the *Occupational Health and Safety Act*. These are:

- The receipt, consideration and disposition of worker health and safety concerns.
- Participating in the employer's hazard assessment process.
- Making recommendations about worker health and safety to the employer.
- Reviewing the employer's work site inspection records.

Employers must consult with unions representing their workers before putting a required health and safety committee in place.

Workers and other parties at the work site must be able to contact their health and safety committee with any concerns or questions. **The employer must post how to contact the health and safety committee at all applicable work sites** (or share by a different method, if the committee agrees). Employers must also keep a record of committee member names and contact information.

OHS officers may ask health and safety committee members or their designate to accompany them on inspections.

Committee structure

The health and safety committee must have worker and employer members. The employer decides how many worker members the committee needs, and sets a reasonable time frame for them to be selected.

- The number of worker members must fairly represent both unionized and non-unionized workers.
- There also must be the right number and type of worker members to address relevant health and safety concerns.
- There can't be more employer members than worker members.

Workers select the worker members. The employer selects employer members.

- Applicable unions select committee members to represent unionized workers.
- Non-unionized workers select their own committee members.
- If worker members aren't selected by the union or non-unionized workers within the set time, the employer must select those worker members.

The committee must have two co-chairs. Employer members select one co-chair, and worker members select the other co-chair.

Terms of Reference

A health and safety committee must establish terms of reference to support the effective operation of the committee.

Section 197 of the Occupational Health and Safety Code says that the terms of reference must include:

- The term of office for committee members.
- How often the committee meets and how it keeps records.
- Processes for:
 - Selecting co-chairs.
 - Selecting worker members that represent the employer's workers.
 - Conducting meetings.
 - Forwarding health and safety concerns to the employer.
 - Replacing a member during their term of office.
 - Resolving disputes, if the members can't agree on a recommendation to the employer.
 - Addressing circumstances where members are not carrying out their duties.

These are minimum requirements only. Health and safety committees can include other processes or requirements in their terms of reference as needed to carry out their role and duties. The terms of reference template provided at the end of this section gives some examples.

Meeting requirements

Meetings are not considered valid unless there is a **quorum**. At least half the committee members must be present for there to be a quorum. This ensures a fair representation of the committee. Worker and employer members must be present, with at least half of those present being workers.

A health and safety committee must hold a special meeting if asked to do so by an Alberta OHS officer.

Employers must keep a copy of special health and safety committee meeting minutes called by an OHS officer for two years, and must make them readily available for inspection by committee members or an OHS officer.

Training

Under the Occupational Health and Safety Code, employers must train health and safety committee members or health and safety representatives. The training must include:

- The roles and responsibilities of co-chairs, committee members, and health and safety representatives.
- Work site party obligations.
- Workers' rights under the *Occupational Health and Safety Act*.



Where applicable, farm and ranch employers of waged, non-family workers only have to train health and safety committee co-chairs or health and safety representatives – not all committee members. For more information, read Section 1.1(5) of the Occupational Health and Safety Code.

This is work time

Workers who are health and safety committee members and representatives are considered to be at work when they are performing their duties or attending training related to those duties.

The *Occupational Health and Safety Act* stipulates that health and safety committees and representatives must hold their meetings and carry out their duties during normal working hours.

Compensation for committee/representative work would be determined by employment standards law, individual employment contracts, or collective agreements.



To learn about Alberta employment standards, download the *Employment standards tool kit for employers* available at alberta.ca/employment-standards-publications.

Address concerns together

The employer must work with the health and safety committee or representative to address any health and safety concerns they raise, and to consider and/or implement any recommendations to remedy health and safety issues.

If the parties cannot resolve a problem, any one of them may contact the Alberta OHS Contact Centre. The matter will then be referred to an OHS officer.

Health and safety committee terms of reference (sample)

This is one example of a health and safety committee terms of reference. You can find a Microsoft Word version of this sample terms of reference in *Occupation health and safety starter kit: template package* in **Additional resources** (General). **If you choose to use this sample, make sure you customize it to your work and work site.**

Introduction

The <employer name> Health and Safety Committee has adopted these terms of reference to guide its operations in alignment with the *Occupational Health and Safety Act*, Regulation and Code.

The committee hereby confirms that any appointments made prior to the date that these terms of reference are approved and effective, are valid, and made in compliance with occupational health and safety laws.

These terms of reference do not include employer responsibilities related to health and safety committee functioning, including those set out in the act, regulation and code.

Committee membership

Members

Members are selected in compliance with Sections 13(4) and 13(5) of the *Occupational Health and Safety Act* and Section 196.1 of the Occupational Health and Safety Code.

- As determined by <employer name>, a total of <number> workers members are needed to equitably represent the workers and address relevant health and safety concerns:
 - <number> bargaining unit members from <union name>.
 - <number> representing non-union workers.
- Worker members cannot be management or persons associated with management of the work. All committee members must be directly employed by <employer name>.
- Bargaining unit members are selected using the following process set by <union name>:
 - <insert process steps>.
- The committee has set the following processes for selecting non-union worker members:
 - <insert process steps that ensure non-union workers select their representatives, for example: nomination process; voting by non-union workers>.
 - <include applicable decision processes, for example: how to choose from multiple nominees; how to resolve tie votes>.
 - The initial worker members must be selected by the processes above within <reasonable time frame set by the employer>.

Worker participation

- Vacancies must be filled within *<enter number of days>* from the day that the vacancy occurs.
- The committee will include *<number not greater than the number of worker members>* employer members to represent the employer.
 - *<employer name>* chooses the employer members.
 - *<other requirements, for example: employer members are selected from management or persons associated with management of the work>*.

Co-chairs

In compliance with Section 196.2 of the Occupational Health and Safety Code:

- The committee will have two co-chairs: one representing workers; the other representing the employer.
- The employer co-chair is selected by the employer's representatives on the committee according to the following process:
 - *<insert process steps >*.
 - *<include applicable decision processes>*.
- The worker co-chair is selected by the worker's representatives on the committee according to the following process:
 - *<insert process steps>*.
 - *<include applicable decision processes>*.

Secretary

- The secretary is selected by the committee members according to the following process:
 - *<insert process steps>*.
 - *<include applicable decision processes>*.

Non-voting, ex-officio members, guests

- Non-voting members include:
 - *<list applicable individuals, for example: a representative from a specific business area to act as an expert resource to the committee; the secretary (if they are not selected from the committee membership); the employer's health and safety advisor>*.
- Non-voting, ex-official members are permitted to attend all meetings of the committee.
- Guests are permitted to attend meetings with the prior agreement of the committee.
- Any Alberta OHS officer has the right to attend any committee meeting as an observer.

Committee responsibilities

The committee must carry out duties required by or implicit in Sections 13(6), 17(5), 17(12) and 33(6)(d) of the *Occupational Health and Safety Act*, and provisions of the code.

- Participate in the hazard assessment process set by *<employer name>*.

- Review *<employer name>* health and safety records including:
 - Work site inspection documentation.
 - Incident investigation reports received under Section 33 of the act.
 - Dangerous work refusal reports received under Section 17 of the act.
 - Worker overexposures received under Section 22(3) of the code.
- Ensure receipt of worker concerns as follows:
 - *<insert all process steps set out by the committee, for example: concerns received via anonymous feedback box kept in the staff room at each work site; concerns received by email to the committee email address; concerns received through the employer's dangerous work refusal notifications>*.
- Consider health and safety concerns, including those:
 - Received from workers.
 - Raised by committee members.
 - Identified through review of *<employer name>* health and safety records.
- Make recommendations on any health and safety concerns using the process described in "Forwarding concerns and recommendations".
- Participate in developing, implementing and reviewing *<employer name>* violence and harassment prevention plan.
- Participate in developing and implementing certain procedures related to hazardous products (WHMIS).
- Maintain the confidentiality of information provided to the committee in relation to a health and safety incident, dangerous work refusal or any other matter deemed to be confidential by the committee or the employer, unless authorized by the employer or required under law.

The committee will review these terms of reference at least *<frequency, for example, once per year>*.

Co-chairs

In addition to duties described elsewhere in the terms of reference, the co-chairs work with members to achieve consensus regarding concerns and recommendations. This may involve acting as a moderator during, or encouraging member participation in, committee discussions.

Secretary

In addition to duties described elsewhere in these terms of reference, the secretary *<insert additional duties, for example, arranges for meeting space>*.

Meeting framework

Frequency and scheduling

- Committee meetings will be scheduled:
 - *<insert meeting frequency>*.
 - *<insert procedure set by committee, for example: providing committee members two weeks' notice of time and place of meeting>*.
- In compliance with Section 13(7) of the *Occupational Health and Safety Act*, committee meetings will be held during normal working hours.
- In compliance with Section 198(1) of the Occupational Health and Safety Code, the committee will hold a special meeting if required to do so by an Alberta OHS officer.

Agenda

- The secretary will request agenda items from the members at least *<number>* days before the meeting.
- The secretary will prepare, and the co-chairs approve, a meeting agenda at least *<number>* days before the meeting.
- The secretary will distribute the agenda to members at least *<number>* days before the meeting.

Conducting meetings

The co-chairs lead meetings according to the following processes:

- The co-chairs will alternate leading meetings.
- *<insert additional process or references, for example: the co-chair leading the meeting will begin by reading the agenda; committee members can request additions to the agenda; the committee will decide whether to accept additions; the committee will follow the agenda items in order; the committee will follow specific point of order rules>*.
- The co-chair leading the meeting will put any appropriate items to the committee for a vote.

Quorum

- To carry out valid business, the committee will meet quorum requirements set out in Section 199 of the Occupational Health and Safety Code:
 - At least half the committee members must be present.
 - Both worker and employer members must be present.
 - At least half of the members present are worker members.
- Additionally, the committee has set the following quorum requirements:
 - *<insert additional applicable requirements, for example: a certain number of bargaining unit members must be present>*.

Voting

Committee votes will be held according to the following process:

- *<describe process, for example: consensus; majority vote>.*

Meeting records

- The secretary records committee meetings through the following process:
 - *<describe process selected by the committee, for example: recording; written notes>.*
- The secretary prepares and distributes the records to all committee members through the process:
 - No more than *<number>* days after the meeting.
 - Committee members can provide the secretary with corrections within *<number>* days of receipt.
 - Secretary will make any necessary corrections and redistribute within *<number>* days.
- The secretary may, with the permission of the committee, distribute the records to the following parties:
 - *<list who else can receive the records, for example: employer; union; general workers>.*
- The secretary maintains committee meeting records according to the following process:
 - Records are kept *<where and in what form, for example: in secure network drive, notes in secure file cabinet>.*
 - Records are retained for *<number>* years.
 - Records are accessible by the following parties: *<list>.*

Forwarding concerns and recommendations

- The co-chair who leads a meeting will forward the committee's health and safety concerns or recommendations to the employer within *<number>* days or another period specified by the committee, if applicable.
- The co-chair will forward the concerns or recommendations according to the following process:
 - *<insert process steps, for example: who will receive the concern or recommendation; how a concern or recommendation is followed up if needed; how employer's response is communicated back to the committee>*

Term of office

- The committee has set each member's term in office at *<insert number>* years.
- *<include any additional rules the committee has set related to term of office, for example: number of terms an individual can serve consecutively; number of terms an individual can serve in total>.*

Replacing members during terms of office

- The committee may remove a member from the committee, if the committee determines that the member has done any of the following:
 - <describe reasons why a member would be removed from office, for example: not fulfilling duties; conflict of interest; disruptive behaviour at meetings; any other reason that could compromise the reputation or functioning of the committee>.
- Removal of a committee member will be carried out according to the following process:
 - <describe removal steps here, for example: a two-thirds vote to remove by the committee>.
- If a member cannot complete their term in office or is removed from the committee, a new member will be selected following the processes specified in “Committee membership”.

Dispute resolution process

- When an item is not settled through the voting process described in “Meeting framework”, the co-chair who is leading the meeting will make all efforts to resolve the issue.
- Committee members will work together collaboratively and respectfully, to best resolve issues and reach consensus.
- If the issue cannot be resolved, the co-chair will forward the concerns of the committee, including the points of disagreement, to the employer. The co-chair will follow the process described in “Forwarding concerns and recommendations”.

Terms of reference approval and effective date

We, the co-chairs of the committee, confirm that these terms of reference have been passed by the committee.

Employer co-chair	Worker co-chair
Print name	Print name
Signature	Signature
Date	Date

This form is for example purposes only. Completing this form alone will not necessarily put you in compliance with the legislation. It is important and necessary that you customize this document to meet the unique circumstances of your work site. Further, it is essential that this document is not only completed, but is used, communicated and implemented in accordance with the legislation. Neither the Crown, nor its agents, employees or contractors, will be liable to you for any damages, direct or indirect, arising out of your use of this form.

Health and safety program

A safe and healthy work site doesn't just happen. It's the result of planning and team effort, where everyone chips in to do their part.

A health and safety program is a co-ordinated system of procedures, processes and other measures that is designed to promote continuous improvement in occupational health and safety. When an employer is required to establish a health and safety program (see below), the employer and their workers must follow the program.

Requirement to establish a health and safety program

A health and safety program is a good tool for every organization to have and to follow.

It's a must-have for employers with 20 or more workers.



An employer who regularly employs 20 or more workers or on the direction of a Director shall, subject to the OHS Code, establish and implement a health and safety program.

Occupational Health and Safety Act, Part 2, Section 16

Volunteers count as regularly employed workers for the purpose of establishing and implementing a health and safety program.

Program elements

An effective health and safety program is tailored to an organization's needs and circumstances. Because of this, Alberta's occupational health and safety laws do not specify mandatory program elements. Employers have flexibility to develop programs that best suit their workplace.

Health and safety programs should include basic health and safety topics that meet or exceed applicable legal requirements. Program elements such as hazard assessment and control, emergency response planning, inspections, orientation and training, incident reporting and investigation, first aid, and harassment and violence prevention will apply to virtually all work sites, no matter the number of workers, nature of work or type of industry.

Depending on your work site, your health and safety program may also include other elements, such as procedures for working alone, or handling and storing hazardous materials.

Also, a good health and safety program includes elements that demonstrate leadership and commitment, and ensure the program stays current and continuously improves.



Program administration

Your health and safety program needs ongoing attention.

Workplaces have a lot of moving parts:

- People change.
- Materials/equipment gets updated.
- Processes and procedures change.
- Work sites change.
- New risks are identified within existing conditions.

Change isn't the only factor that drives the need to review your health and safety program. Discovering new risks associated with existing conditions can also signal the need to update your program.

A health and safety program has to be maintained – and updated – to ensure it continues to be effective. Maintenance can include:

- Reviewing the program at regular intervals, or when there is a change in circumstances at the work site that creates or could create hazards for workers.
- Having systems in place for two-way communication between management, workers, and the health and safety committee or representative (if there is one).
- Analyzing statistics and records regularly to identify trends and potential system improvements.
- Developing health and safety action plans that include follow-up on identified issues.
- Communicating system evaluation and action plan results to workers.

Health and safety topics

This section discusses some key health and safety topics, with a focus on legal requirements:

- Hazard assessment and control.
- Emergency response planning.
- Work site inspections.
- Competency and training.
- Incident reporting and investigating.
- First aid.
- Violence and harassment prevention.
- Obligations to others on site.
- WHMIS.
- Working alone.

The nature of your operations determines whether the requirements related to WHMIS and working alone apply to you. However, the requirements related to the rest of the topics apply broadly to all work sites.

Consider your specific operations and **make sure you meet all applicable health and safety requirements.**

Hazard assessment and control

Every work site has situations, conditions or things that may be dangerous to health and safety. Employers, supervisors and workers must know what those hazards are in order to address them.

A **hazard** is a situation, condition or thing that may be dangerous to health and safety.

Common hazards in just about any workplace include things like:

Left uncontrolled, any one of these hazards has the **potential to impact a person's quality of life** in some way for some time:

It's your responsibility as an employer to ensure workplace hazards are **identified**, and **eliminated or controlled** so workers stay healthy and safe on the job:



manual materials handling



slip, trip and fall hazards



working alone



workplace harassment



hazardous chemicals



back injury



broken arm



medical emergency



absenteeism



chemical burn



use mechanical lift



keep floors clean and dry



provide communication device



provide respectful workplace training



wear protective gloves

Hazard assessment and control

Hazard assessments are required by law

The hazard assessment and control process is a documented approach to prevent work-related illness or injury to workers and others who are present at a work site. This is a **foundational health and safety responsibility in every workplace**, and is a central element in any health and safety system.

Hazard assessments identify existing or potential problems and determine where to focus resources for ensuring health and safety.

Employers are required by law to do hazard assessments.



An employer must assess a work site and identify existing and potential hazards before work begins at the work site or prior to the construction of a new work site.

Occupational Health and Safety Code, Part 2, Section 7(1)

A team approach is necessary

If you have a health and safety committee or representative, they must be involved in the hazard assessment. You also must involve any affected workers. Different people have different ways of seeing things, and workers are the individuals doing the work; that puts them in a position to provide insight.



The duties of a joint health and safety committee include ... participation in the employer's hazard assessment;

Occupational Health and Safety Act, Part 2, Section 13(6)(b)



An employer must involve affected workers in the hazard assessment and in the control or elimination of the hazards identified.

Occupational Health and Safety Code, Part 2, Section 8(1)

An orderly approach is needed

You must identify any existing and potential hazards and then eliminate or control them. The way to do this systematically is through a formal hazard assessment. The basic steps are below. You will likely want to tailor the process to your organization's specific needs.

Here are the **basic steps** for conducting a hazard assessment:

- 1 Figure out what people do.
- 2 List all work tasks or activities for each job.
- 3 Identify all health and safety hazards related to each task or activity.
- 4 Find ways to eliminate or control the hazards.
- 5 Implement the selected controls.
- 6 Communicate the hazards and follow the controls.
- 7 Monitor effectiveness of controls.
- 8 Review and revise the hazard assessment.

To get you started, you'll find a template on page 52. Make sure to customize the template to your specific work environment. The sample forms on pages 53-56 can give you some ideas about how to do this.

For more on how to carry out the steps in a formal hazard assessment, see *Hazard assessment and control: a handbook for Alberta employers and workers* in **Additional resources** (Hazard assessment and control).

Keep a written record

You must document both the results of the hazard assessment **and** what you have done to either eliminate or control the hazards that were identified.



An employer must prepare a report of the results of a hazard assessment and the methods used to control or eliminate the hazards identified.

Occupational Health and Safety Code, Part 2, Section 7(2)

Communicate the results

Workers need to be aware of any known or potential hazards they could encounter. They also need to know any necessary health and safety measures or procedures that are in place to keep everyone healthy and safe on the job.

The written hazard assessment and control report mentioned on the previous page is an important part of making sure workers know the hazards associated with their work. The report must be readily available for reference at the work site.



Every employer shall keep readily available information related to work site hazards, controls, work practices and procedures and provide that information to:

- (a) the joint health and safety committee, if there is one, or health and safety representative, if there is one, at the work site,
- (b) the workers, and
- (c) the prime contractor, if there is one.

Occupational Health and Safety Act, Part 1, Section 3(4)

Supervisors also have a responsibility to advise their workers of all known or reasonably foreseeable hazards.



Every supervisor shall ... advise every worker under the supervisor's supervision of all known or reasonably foreseeable hazards to health and safety in the area where the worker is performing work,

Occupational Health and Safety Act, Part 1, Section 4(b)

Hazard assessments need to be repeated

You must repeat the hazard assessment and control process.

Whenever changes occur at a work site (for example, new tasks are introduced or work conditions change), another hazard assessment must be completed. **Changes at the work site can signal the need for a new hazard assessment.**



poor lighting



slippery surfaces



extreme temperatures



introduction of new equipment

Repeating the hazard assessment and control process can prevent unsafe or unhealthy conditions from developing, and will help determine if existing controls are actually working as intended.

Even if nothing has changed, **hazard assessments must be periodically repeated** to prevent the development of unsafe and unhealthy working conditions.



An employer must ensure that the hazard assessment is repeated

- (a) at reasonably practicable intervals to prevent the development of unsafe and unhealthy working conditions,
- (b) when a new work process is introduced,
- (c) when a work process or operation changes, or
- (d) before the construction of significant additions or alterations to a work site.

Occupational Health and Safety Code, Part 2, Section 7(4)

The date is an important part of the record

There should never be any question as to when a hazard assessment was completed. Alberta law requires you to put the date on them.



An employer must ensure that the date on which the hazard assessment is prepared or revised is recorded on it.

Occupational Health and Safety Code, Part 2, Section 7(3)

Keep a written record of what you do, put the date on it and keep it up to date.

Think about both health and safety hazards

A **health hazard** is anything that could harm someone's health, either immediately or over time:



loud noises



repetitive movements



sun exposure



chemical exposure

A **safety hazard** is anything that could cause injury or damage. An injury caused by a safety hazard is usually immediate:



falling objects



slippery surfaces



sharp equipment



icy roads

Left uncontrolled, any one of these hazards has the potential to impact a person's quality of life in some way for some time.

Look beyond the obvious

Workplace hazards can be grouped into four main categories: physical hazards, chemical hazards, biological hazards, and psychosocial hazards. Here are some examples in each category:

Physical hazards



slippery/
uneven surfaces



repetitive
motions



lifting
heavy loads



extreme
temperatures



working around
moving equipment



vibration



noise



working at
heights



poor lighting



working around
vehicles

Chemical hazards



cleaning products/
solvents



battery acid



vapour
(spray paint)



hazardous
merchandise



maintenance
products



fumes



gases
(carbon monoxide)



byproducts/waste
products from a
process

Biological hazards



viruses



mould



bacteria



body fluids



sewage



allergens



animal/pet
waste

Psychosocial hazards



harassment



stress



fatigue



shiftwork



working
alone



violence

A task or job activity can have multiple hazards. These can be from different hazard categories.

Follow the hierarchy of controls

Elimination

You must eliminate a hazard wherever you can. When elimination is not possible or reasonable, the hazard must be controlled.



If an existing or potential hazard to workers is identified during a hazard assessment, an employer must take measures in accordance with this section to

- (a) eliminate the hazard, or
- (b) if elimination is not reasonably practicable, control the hazard.

Occupational Health and Safety Code, Part 2, Section 9(1)

Alberta's Occupational Health and Safety Code outlines the hierarchy of controls to follow when elimination of the hazard is not an option. **They must be implemented in the order in which they are presented below.**

Hazard controls



If a hazard can't be eliminated or controlled using a single control method, the employer can use a combination of **engineering controls**, **administrative controls** and **personal protective equipment**.

Hazard assessment and control

Your hazard assessment and control report must include all identified hazards, as well as all controls that you have in place to protect workers from those hazards. The following are examples of the types of controls.

Engineering controls

Next to eliminating a hazard, controlling it at the source is the most effective means of preventing illness or injury to workers.



install physical barriers
to protect those
working alone



use equipment
guards



use a forklift to
lift heavy loads



ensure
ventilation

Administrative controls

When elimination isn't an option and engineered controls aren't feasible, employers are expected to do what they can to introduce controls that change the way people work.



develop safe work
practices and
procedures



provide training
and supervision
for workers



limit exposure
time by rotating
jobs



display warning
signs

Personal protective equipment

Personal protective equipment is an employer's third line of defense for controlling hazards that cannot be eliminated. It's introduced only after engineering and administrative controls are found to be unworkable for specific hazards.



wear approved
footwear



wear safety
glasses



wear respirators



wear protective
gloves



wear reflective
vests

Personal protective equipment can only be effective if workers use it properly. The basic obligation to ensure workers use required personal protective equipment is shared between employers, supervisors and workers. **Directions about proper selection and use are in Part 18 of the Occupational Health and Safety Code.**



Every worker shall ... at all times, when the nature of the work requires, use all devices and wear all personal protective equipment designated and provided for the worker's protection by the worker's employer or required to be used or worn by the worker by this Act, the regulations and the OHS Code,

Occupational Health and Safety Act, Part 1, Section 5(1)(c)



If a worker is required under the Act, the regulations or this Code to use or wear specific equipment or personal protective equipment, the employer and supervisor must ensure that the worker uses or wears the equipment or personal protective equipment at the work site.

Occupational Health and Safety Code, Part 1, Section 3.2

Your hazard assessment may reveal many hazards, all of which must be addressed. It may not be realistic to address them all immediately. Prioritize the hazards you've identified, and address those that pose the greatest risk right away. **Make sure you introduce interim controls for any hazards that may have to wait for more permanent solutions.**



Hazard assessment and control report (template)

This is one example of a hazard assessment and control report template. You can find a Microsoft Word version of this report template in *Occupation health and safety starter kit: template package in Additional resources* (General). **If you choose to use this template, make sure you customize it to your work and work site.**

Job/position/work type:

Date of assessment:

Assessment performed by: <names>

Reviewed/revised:

Task (List all tasks/activities of the job/position.)	Hazard (List all existing and potential health and safety hazards related to the identified tasks.)	Controls (List the controls for each hazard: elimination, engineering, administrative, personal protective equipment or a combination thereof.)	Date implemented
		Elimination: Engineering: Administrative: PPE:	
		Elimination: Engineering: Administrative: PPE:	
		Elimination: Engineering: Administrative: PPE:	

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Hazard assessment and control report (sample #1)

Job/position/work type: Volunteer canvasser

Date of assessment: January 5, 2025

Assessment performed by:

Reviewed/revised:

Hana Park, Mgr Operations; Andreas Gataki, Volunteer Coordinator;
Kate Burdett, Admin Assistant; Manny Bridges, HSC member

Task (List all tasks/activities of the job/position.)	Hazard (List all existing and potential health and safety hazards related to the identified tasks.)	Controls (List the controls for each hazard: elimination, engineering, administrative, personal protective equipment or a combination thereof.)	Date implemented
Driving to/from route	Adverse weather conditions	Elimination: Postpone to avoid snow storms and other extreme weather Eng: Confirm vehicle maintenance; wiper fluid and winter tires Admin: Schedule campaign for late spring; consult road report; follow organization's safe work practices on Journey Management	December 9, 2024
Canvassing door-to-door	Slippery surfaces	Admin: Volunteer orientation training (video) and policy to reinforce the use of sidewalks and handrails where available PPE: Wear non-slip footwear	December 19, 2024
	Robbery	Admin: Credit card payment enabled to reduce cash donations; direction to surrender cash in the event of robbery; money envelope to discretely store cash donations	November 4, 2024
	Angry residents	Admin: Clear identification of volunteer role and organization; policy to avoid knocking on doors with "No Soliciting" signage; policy to refrain from entering homes; canvassers should always be visible from roadway	November 22, 2024
	Working alone	Elimination: Require canvassers to go out in pairs Admin: Confirm working fully charged cell phone before start of shift and emergency contact cell phone numbers PPE: Personal security alarm	December 9, 2024

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Hazard assessment and control report (sample #2)

Job/position/work type: Administration/office work

Date of assessment: October 3, 2024

Assessment performed by:

Reviewed/revised:

Claire Miller, Branch Manager; Jabbar Akram, Sr. Accountant; Jorge Acosta, Engineer/Health and Safety Representative

Task (List all tasks/activities of the job/position.)	Hazard (List all existing and potential health and safety hazards related to the identified tasks.)	Controls (List the controls for each hazard: elimination, engineering, administrative, personal protective equipment or a combination thereof.)	Date implemented
Operating PC (general computer tasks)	Extended periods of sitting	Eng: Ergonomic set-up of workstation Admin: Take micro-breaks to get up and stretch	September 20, 2024
	Glare from monitor	Eng: Anti-glare screens or monitors	April 19, 2024
Photocopying, faxing, stapling, hole punching	Repetitive motion	Admin: Take breaks as necessary	February 21, 2024
Refilling toners	Contact with chemicals/toner	Admin: Place toner lid from new cartridge on the old cartridge to prevent exposure; WHMIS training PPE: Use nitrile gloves	March 4, 2024
Filing	Awkward positions	Admin: Use stool; take breaks to stretch if required	February 21, 2024
	Struck by/crushed	Eng: Cabinet engineered to not allow more than one drawer to be open at a time (prevent tipping) Admin: Ensure cabinets are loaded from the bottom up	May 23, 2024
Operating paper shredder	Loose clothing or jewellery could be caught in shredder opening	Eng: Auto shut-off switch/emergency shut off Admin: Ensure loose clothing, jewellery, long hair is tucked in before operating shredder; shred on a different day	February 21, 2024

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Hazard assessment and control report (sample #3)

Job/position/work type: Gas station attendant

Date of assessment: March 21, 2025

Assessment performed by:

Reviewed/revised:

Drago Jankovic, Owner; Drake Wilde, Attendant; Trey Liu, Attendant/Health and Safety Representative

Task (List all tasks/activities of the job/position.)	Hazard (List all existing and potential health and safety hazards related to the identified tasks.)	Controls (List the controls for each hazard: elimination, engineering, administrative, personal protective equipment or a combination thereof.)	Date implemented
Cashier	Robbery	Eng: Physical barrier (kiosk) with limited public access; time lock safe on site inside kiosk; panic button installed; maintain good visibility into and out of the work site; video surveillance equipment installed and maintained Admin: Post signage with max. cash on site message; worker training in safe cash-handling procedures; limit the quantity of valuable items (e.g. lotto tickets, cash) present	February 28, 2025
	Working alone	Admin: Worker training in working alone procedures; clear sight lines; after hours check-in schedule PPE: Personal emergency transmitter	February 28, 2025
Washroom maintenance	Exposure to chemicals/bio hazards	Eng: Sharps containers Admin: WHMIS training; safe work procedures (e.g. sharps safe handling procedures) PPE: Disposable gloves	March 21, 2025
Stocking items on shelves	Manual handling of materials	Admin: Standard operating procedures for materials handling; safe lifting training	March 10, 2025

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Hazard assessment and control report (sample #4)

Job/position/work type: Shipper/Receiver

Date of assessment: June 3, 2024

Assessment performed by:

Reviewed/revised:

Johannes Andersson, Warehouse Manager; Boris Phelps, Shipper/Receiver; Mazaa Tekle, Inventory Control Clerk/Health and Safety Representative

Task (List all tasks/activities of the job/position.)	Hazard (List all existing and potential health and safety hazards related to the identified tasks.)	Controls (List the controls for each hazard: elimination, engineering, administrative, personal protective equipment or a combination thereof.)	Date implemented
Operating compactor/baler	Contact with moving parts	Eng: Equipment safeguards in place as per manufacturer's specifications Admin: Standard operating procedures for safe use of equipment	February 21, 2024
	Crushing/cutting	Eng: Emergency shutdown switch; alarm Admin: Worker training PPE: Steel-toed footwear; protective gloves	March 8, 2024
	Loud noises	PPE: Hearing protection	March 22, 2024
	Mechanical failure	Admin: Pre-use inspection; Preventative Maintenance Policy	February 21, 2024
	Repetitive motion	Eng: Ergonomic design of processing area Admin: Training in safe lifting; scheduled breaks; job rotation	March 7, 2024
Operating forklift	Contact with moving equipment	Eng: Backup alarm Admin: Operator safety training	February 21, 2024
	Static posture	Eng: Adjustable cab ergonomics Admin: Scheduled breaks; job rotation	May 27, 2024

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Emergency response plan

Alberta occupational health and safety laws require all work sites to have an emergency response plan. Some requirements are very specific. For instance, Part 7 of the Occupational Health and Safety Code sets out employer obligations related to emergencies that require rescue and evacuation.



An employer must establish an emergency response plan for responding to an emergency that may require rescue or evacuation.

Occupational Health and Safety Code, Part 7, Section 115(1)

As well, an employer's general duty to ensure the health and safety of persons at or near the work site includes doing what is reasonably practicable to be prepared for emergencies.

An emergency response plan must anticipate and address any and all emergency situations that could realistically develop at your workplace.

Examples of emergency situations might include:



fire



structural collapse



extreme weather



medical emergency



robbery



bomb threat



vehicle collision

Emergency response plan

Each work site requires its own emergency response plan specific to that location.



An emergency response plan must include the following:

- (a) the identification of potential emergencies;
- (b) procedures for dealing with the identified emergencies;
- (c) the identification of, location of and operational procedures for emergency equipment and personal protective equipment;
- (d) the emergency response training requirements;
- (e) the location and use of emergency facilities;
- (f) the fire protection requirements;
- (g) the alarm and emergency communication requirements;
- (h) the first aid services required;
- (i) procedures for rescue and evacuation;
- (j) the designated rescue and evacuation workers.

Occupational Health and Safety Code, Part 7, Section 116



Involve affected workers

You must involve affected workers when establishing this plan. This could include scheduling a formal meeting, inviting comments during a walk-through, or asking workers to review a draft of the plan for feedback. The nature of the involvement will depend on the nature of your work site and activities, but it must be meaningful.



Engage your health and safety committee or representative (as applicable)

If you have a health and safety committee or representative, their knowledge of the organization's health and safety culture, resources, hazard control measures, and inspection records may make them a valuable resource.



Equip and train workers

Rescue and evacuation workers must be designated by their employer. They also must be equipped and trained in their related responsibilities.



Educate the workforce

Those expected to follow the plan in an emergency need to know what's expected of them.



Ensure access to the plan

Emergency procedures must be in writing and readily available to everyone in the workplace.



Practice the plan

Practicing the procedures will help familiarize everyone with their roles in an emergency. Debrief after a practice or drill to update or improve the plan.



Keep it current

You must ensure your emergency response plan is current. Remember to update your emergency response plan if you move or renovate your location.

An emergency response plan template and a sample form are provided on the next several pages to help get you started. Adjust these to meet your needs or develop a custom format as you choose. Just make sure your plan addresses all of the elements outlined in the Occupational Health and Safety Code, and all foreseeable emergencies.

For more about how to develop an emergency response plan, see *Emergency response planning: an occupational health and safety tool kit* in **Additional resources** (Emergency response plan).

Emergency response plan (template)

This is one example of an emergency response plan. You can find a Microsoft Word version of this plan template in *Occupation health and safety starter kit: template package* in **Additional resources** (General). **If you choose to use this template, make sure you customize it to your work and work site.**

Employer:

Work site address:

Completed by:

Date:

Potential emergencies

(For example: medical event, flood, fire, robbery. Refer to your hazard assessment to determine which hazards could require rescue or evacuation. List those here.)

Work site resources and procedures

Emergency and personal protective equipment, including fire protection requirements

(For example: alarms, sprinklers, fire suppression systems, fire extinguishers, hoses, fire doors.)

Equipment	Location	Operating procedures

First aid

(For example: type and location of first aid kits and supplies; first aiders per shift; first aid room if applicable; transportation plan.)

Type of first aid kit/supplies	Location

Shift	First aider names
Morning	
Afternoon	
Evening	

Location of first aid room: (if applicable)

Transportation plan:

List and location of emergency facilities

(For example: fire station, hospital, police.)

Facility name	Address	Distance from work site

Alarm and emergency communication requirements

(For example, type of alarm, paging or PA system.)

Type	Details

Rescue and evacuation procedures

(Detailed procedures to be followed for each identified emergency, including who is responsible for what.)

- (Procedure)
 - (Procedure steps)
- (Procedure)
 - (Procedure steps)

Emergency response procedures

(Detailed procedures to be followed for each identified emergency, including who is responsible for what.)

- (Emergency)
 - (Procedure steps)
- (Emergency)
 - (Procedure steps)

Emergency response training and requirements

(List the positions or names of workers trained to use each type of emergency equipment and those trained in rescue and evaluation procedures.)

Shift	Position/names of trained workers	Training received	Training frequency
Morning			
Afternoon			
Evening			

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Emergency response plan (sample)

Employer: ABC Hotel and Restaurant

Work site address: 123 Lakeshore Rd, Red Deer, AB

Completed by: Leo Skliar, GM; Chris Bergeron, Marketing; Jasmina Snow, event coordinator and HSC co-chair

Date: March 6, 2025

Potential emergencies

(For example: medical event, flood, fire, robbery. Refer to your hazard assessment to determine which hazards could require rescue or evacuation. List those here.)

Robbery	Power outage	Kitchen fire	Gas leak
Water main break causing flooding	Vehicle crashes into building	Tornado	Blank cell

Work site resources and procedures

Emergency and personal protective equipment, including fire protection requirements

(For example: alarms, sprinklers, fire suppression systems, fire extinguishers, hoses, fire doors.)

Equipment	Location	Operating procedures
Automated external defibrillator	Behind the front desk	Follow written instructions on the case and voice prompts from the device.
First aid kit	At the front desk	Access as needed. Complete all required paperwork.
Fire alarm pull station	Next to stairwell doors on each floor	Pull lever down to activate.
Fire extinguisher	Mid-point - all hallways	Detach from wall bracket, pull pin on extinguisher, aim at base of fire, squeeze trigger, sweep the nozzle from side to side at the base of the flames.
Panic button	Front desk - underside left	Press button to activate.
Security cameras	Monitored in manager's office	3-week data storage.

First aid

(For example: type and location of first aid kits and supplies; first aiders per shift; first aid room if applicable; transportation plan.)

Type of first aid kit/supply	Location
CSA Type 2 Basic, small (first aid kit)	At the front desk
Blankets	Back linen supply room
Automated external defibrillator	Behind the front desk
Eye wash station	Laundry room and kitchen

Shift	First aider names
Morning	Karim H and Julie B
Afternoon	Dawn G and Daniel S
Evening	Sean M and Scot H

Location of first aid room: N/A

Transportation plan: Call 9-1-1 for ambulance

List and location of emergency facilities

(For example: fire station, hospital, police.)

Facility name	Address	Distance from work site
City Hospital	101 Hospital Ave	2 km
Fire Station #3	422 Grand Blvd	4.5 km
Police	10 Centre Ave	5 km
Walk-in clinic	521 Richmond St	3.5 km

Alarm and emergency communication requirements

(For example, type of alarm, paging or PA system.)

Type	Details
Fire alarm	Fire alarm connects automatically to fire department. <ul style="list-style-type: none">Audible signal is steady beepsVisible signal is flashing emergency light
Silent alarm	Silent alarm connects to the alarm company. Company monitors the alarm 24/7, will dispatch police immediately.
Cell phones	Work site cell phones located at front cash and in office are for emergency use.
Alberta Emergency Alert app	Alberta Emergency Alert app on work site cell phones will sound if there are municipal emergency alerts.

Emergency response plan

Rescue and evacuation procedures

(Detailed procedures to be followed for each identified emergency, including who is responsible for what.)

- Call 9-1-1 for police or fire department if workers or others require rescue.
- Emergency wardens must put on their emergency vest and hard hat and gather their clipboard with pen and paper, first aid kit, portable radio and whistle.
- Emergency wardens will remain calm, take control and direct workers and others to the predetermined exit routes.
- All workers and others will evacuate and meet at muster point in the northeast corner of the parking lot across the street. Freezing weather - muster point is inside the entrance to the main level of the underground parkade next door.

Emergency response procedures

(Detailed procedures to be followed for each identified emergency, including who is responsible for what.)

- Robbery
 - Trigger panic button (silent alarm).
 - Co-operate with the robber's demands.
 - If possible, seek shelter in a secure (locked) location (i.e. manager's office).
 - Call 9-1-1 when safe to do so.
- (Etc., for each of the identified "Potential emergencies".)

Emergency response training and requirements

(List the positions or names of workers trained to use each type of emergency equipment and those trained in rescue and evaluation procedures.)

Shift	Position/names of trained workers	Training received	Training frequency
Morning	<ul style="list-style-type: none">• Front desk• General manager• Maintenance	Fire extinguisher	Annual refresh
Afternoon	<ul style="list-style-type: none">• Front desk• Floor manager• Room attendant	Intermediate first aid	Every 3 years with annual CPR
Evening	<ul style="list-style-type: none">• Night auditor	Emergency warden	Annual refresh

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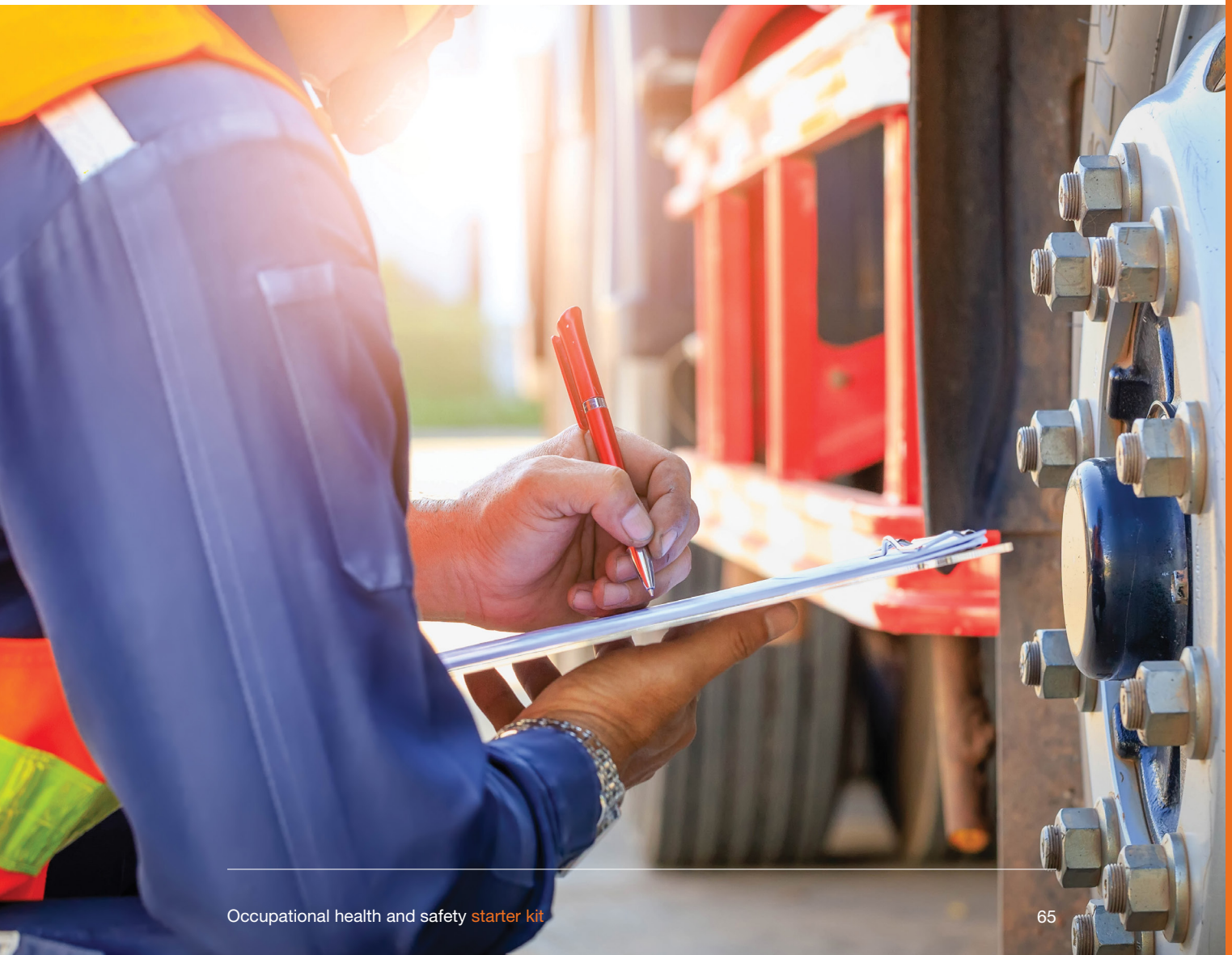
Work site inspections

Inspections are a valuable tool

Inspections are an important way for you to find out if day-to-day activities support the organization's overall health and safety goals.

Inspections are intended to check for and report on specific things in the workplace, and could include anything from the way workers are doing their job to the equipment they're using to do it.

Work site inspection procedures and an inspection schedule are key elements of a health and safety system.



Work site inspections

All employers must conduct regular inspections

These are some examples of what you're looking for:

- Are workers following safe work procedures?
- Are tools and equipment in good working order?
- Are any unsafe or unhealthy conditions present?

Work site inspections can identify hazards that may have been missed during hazard assessments. They can spot where controls introduced earlier might not be working, or if new hazards have appeared as a result of controls being introduced.

This is what you do with what you find:

- 1 Record any hazards identified during a work site inspection.
- 2 Address any serious hazards or unsafe conditions right away.
- 3 Control other identified hazards in a timely fashion.

Develop ways to eliminate or control all hazards found. Remedy serious hazards such as unsafe or unhealthy work practices right away. If a hazard can't be fully addressed immediately, make sure you have effective interim controls in place. (For example, if you need an engineering control that will take time to put in place, make sure you have effective administrative controls in the meantime.

The health and safety committee or representative must review your work site inspection records.



The duties of a joint health and safety committee include ... review of the employer's work site inspection documentation.

Occupational Health and Safety Act, Part 2, Section 13(6)(d)

Develop an inspection schedule and procedures

When developing an inspection schedule and procedures, consider the factors described on the next page.

The work site inspection template and sample on pages 68 and 69 may also help get you started.

The type of work site



home office



construction site



warehouse



vehicle

The size of the work site



small building



skyscraper



company vehicle

The number of workers on site



working alone



few people



multiple work
site parties

The nature of the work being performed



heavy industry



retail



shiftwork



repetitive

The hazards encountered



slippery floors



trip and fall hazards



heavy lifting



bullying



chemical spills

Work site inspection (template)

Consider using a form like this to record your work site inspection findings, as well as any actions taken during the inspection, and the employer representative to whom issues were referred for follow-up. You can find a Microsoft Word version of this inspection template in *Occupation health and safety starter kit: template package* in **Additional resources** (General). **If you choose to use this template, make sure you customize it to your work and work site.**

Employer:

Date:

Location:

Inspection carried out by:

Area/equipment/ activity being inspected:	Observations:	Hazards identified: <i>(if applicable)</i>	Action taken: <i>(if applicable)</i>	Referred to: <i>(if applicable)</i>

This inspection report was provided to the health and safety committee or representative on: (date)

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Work site inspection (sample)

Employer: Foods'r'Us Grocery

Date: March 12, 2025

Location: 1122 33 Street

Inspection carried out by: Garud Singh, Grocery manager; Blessing Kolawole, Catering/Deli; Shelley Butler, cashier/HSC co-chair

Area/equipment/ activity being inspected:	Observations:	Hazards identified: (if applicable)	Actions taken: (if applicable)	Referred to: (if applicable)
Warehouse exit doors	North exit door is blocked by a stack of empty pallets	Could prevent exit in case of emergency	Pallets removed; discuss need to keep exits clear at next staff meeting	Garud Singh, Grocery manager
Store aisles	Tiles in corner of aisle 7 floor are lifting	Creates a tripping hazard	Inspect tiles around the store and replace them as required In the interim, placed pylons around the tiles in the corner of aisle 7	Gord Macdonald, building maintenance
Meat department	Knives are not stored safely	Staff could cut themselves	Buy and install a wall- mounted knife storage holder; discuss knife storage safety with staff In the interim, placed the knives in a safe area.	Mel Yiu, Supervisor

This inspection report was provided to the health and safety committee on: March 12, 2025

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Competency and training

Working in a healthy and safe manner is no accident. Workers need proper training and skills to stay healthy and safe on the job.

Workers have to be competent. It's your responsibility as an employer to make sure workers have the qualifications, training and experience needed to perform work without supervision or with only minimal supervision.

To be **competent** means adequately qualified, suitably trained, and with sufficient experience to safely perform work without supervision or with only a minimal degree of supervision.

New workers have a high risk of injury and work-related illness. **A timely and thorough worker orientation is important to help prepare workers to perform their jobs safely.** All employers must make sure workers and supervisors are trained so that they have the skills and knowledge to safely perform the work being asked of them.



Workers need to be trained

You must make sure workers are adequately trained in work practices and procedures that are necessary to perform a work task in a healthy and safety manner.

This training must occur before a worker performs the task. This obligation is captured under the general duties of employers, as set out in the *Occupational Health and Safety Act*. More specific directions are given in the Occupational Health and Safety Code.



work-related
equipment



work-related
substances



personal
protective equipment



harassment and
violence prevention



Every employer shall ensure that workers engaged in the work of that employer are adequately trained in all matters necessary to perform their work in a healthy and safe manner.

Occupational Health and Safety Act, Part 1, Section 3(2)

The type of training provided will need to be customized for each work site and job.

Workers must take part in job training provided by their employer and apply what they learn on the job.

Check that the training is effective

It's always a good idea to test the worker's knowledge, skills and abilities at the end of any training. A practical demonstration under controlled conditions may be used to verify if the worker fully grasps the training and knows how to apply it. It will also reveal if training resources are providing value.

On-the-job observation to ensure workers are able to apply training is another way to verify workers are properly trained in the work they perform.

Supervisors need additional training

Supervisors need to know the hazards their workers could face.



Every supervisor shall ... advise every worker under the supervisor's supervision of all known or reasonably foreseeable hazards to health and safety in the area where the worker is performing work,

Occupational Health and Safety Act, Part 1, Section 4(b)

Supervisors need to know what every worker under their supervision needs to know. They must be competent in their role as supervisor.



Every employer shall ensure, as far as it is reasonably practicable for the employer to do so, ... that the employer's workers are supervised by a person who

- i) is competent, and
- ii) is familiar with this Act, the regulations and the OHS Code that apply to the work performed at the work site,

Occupational Health and Safety Act, Part 1, Section 3(1)(d)

Keep track

Keep good records of training provided to workers. This means including the names of the trainer and participants, the nature of the training and the dates the training happened.

Good record keeping helps an employer track which workers received what training, and when. It can help signal when workers are due for re-certification or refresher training.

Templates and sample forms for orientation records and worker training are provided on the next few pages to help get you started.

Worker orientation record (template)

Consider using a checklist like this when training new workers on health and safety in your workplace. You can find a Microsoft Word version of this template in *Occupation health and safety starter kit: template package* in **Additional resources** (General). **If you choose to use this template, make sure you customize it to your work and work site.**

Worker's name:

Date of orientation:

Date of hire:

Supervisor:

Orientation topics	Yes	No	Written work procedures:
Site orientation	<input type="checkbox"/>	<input type="checkbox"/>	
Rights of workers: <ul style="list-style-type: none"> • Right to know • Right to participate • Right to refuse 	<input type="checkbox"/>	<input type="checkbox"/>	
Work site party responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	
Health and safety committee or representative contact information	<input type="checkbox"/>	<input type="checkbox"/>	
Employer's health and safety policies	<input type="checkbox"/>	<input type="checkbox"/>	
Violence and harassment prevention plan	<input type="checkbox"/>	<input type="checkbox"/>	
How to report violence or harassment	<input type="checkbox"/>	<input type="checkbox"/>	
Review of hazards and controls	<input type="checkbox"/>	<input type="checkbox"/>	
How to report unsafe/unhealthy conditions and other health and safety concerns	<input type="checkbox"/>	<input type="checkbox"/>	
How to report incidents	<input type="checkbox"/>	<input type="checkbox"/>	
Review the emergency response plan	<input type="checkbox"/>	<input type="checkbox"/>	
Location of fire exit(s) and fire extinguisher(s)	<input type="checkbox"/>	<input type="checkbox"/>	
How to get first aid treatment	<input type="checkbox"/>	<input type="checkbox"/>	
Location of first aid kit(s) and supplies	<input type="checkbox"/>	<input type="checkbox"/>	
Ergonomics	<input type="checkbox"/>	<input type="checkbox"/>	
WHMIS training (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	
Safety data sheet locations (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	
Use of personal protective equipment (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	
Other (list topics relevant to the work site)	<input type="checkbox"/>	<input type="checkbox"/>	

Worker signature:

Supervisor signature:

This form is a sample only and is for employer reference. Employers are responsible for complying with any applicable privacy or other legislation concerning the collection of worker information. Employers should review the law and confirm its application related to the collection of personal information of workers (e.g., *Personal Information Protection Act*, *Electronic Documents Act*, *Human Rights Act*, etc.). Completing this form alone will not necessarily put you in compliance with the legislation. It is important and necessary that you customize this document to meet the unique circumstances of your work site. Further, it is essential that this document is not only completed, but is used, communicated and implemented in accordance with the legislation. Neither the Crown, nor its agents, employees, or contractors, will be liable to you for any damages, direct or indirect, arising out of your use of this form.

Worker orientation record (sample)

Worker's name: *Kiki Uno*Date of orientation: *April 7, 2025*Date of hire: *April 7, 2025*Supervisor: *Daniel Blais*

Orientation topics	Yes	No	Written work procedures: <ul style="list-style-type: none"> • manual lifting • working on ladders • working alone • repetitive manual tasks • chemical handling/WHMIS
Site orientation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Rights of workers: <ul style="list-style-type: none"> • Right to know • Right to participate • Right to refuse 	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Work site party responsibilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Health and safety committee or representative contact information	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Employer's health and safety policies	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Violence and harassment prevention plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
How to report violence or harassment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Review of hazards and controls	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
How to report unsafe/unhealthy conditions and other health and safety concerns	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
How to report incidents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Review the emergency response plan	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Location of fire exits and fire extinguishers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
How to get first aid treatment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Location of first aid kits and supplies	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Ergonomics	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
WHMIS training	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Safety data sheet locations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Use of personal protective equipment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Worker signature:

Kiki Uno

Supervisor signature:

Daniel Blais

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Training record (template)

Consider using a form like this to document health and safety training in your workplace. You can find a Microsoft Word version of this training record template in *Occupation health and safety starter kit: template package* in **Additional resources** (General). **If you choose to use this template, make sure you customize it to your work and work site.**

Employer:

Name of training course:

Course description:

Recertification requirements:

Names of workers in attendance	Training date	Training location	Facilitator/instructor	Course requirements completed

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Training record (sample)

Employer: Mountainview Building Supplies

Name of training course: OHS Rights and Responsibilities

Course description: This course provides basic training regarding OHS rights and responsibilities.

Recertification requirements: Every two years

Names of workers in attendance	Training date	Training location	Facilitator/instructor	Course requirements completed
Allan Jackson	11/28/2024	Company headquarters	Omar Aper-el	Yes
Pearl Osman	11/28/2024	Company headquarters	Omar Aper-el	Yes
Julie Seng	12/6/2024	Our Town satellite office	Elsie Page	Yes
Charlie Bear	12/6/2024	Our Town satellite office	Elsie Page	Yes
Miriam Aarle	01/24/2025	Company headquarters	Omar Aper-el	Yes
Neve Boucher	01/24/2025	Company headquarters	Omar Aper-el	Yes

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Incident reporting and investigation

First things first. **When something goes wrong and somebody gets hurt on the job, get them appropriate medical attention right away.** Taking care of an injured or ill worker is the first priority.

As well, depending on nature of the incident, you may also have to notify Alberta OHS and/or other authorities. You may also be legally required to investigate the incident and provide an investigation report.

Knowing an incident has happened allows everyone to take steps to prevent it from happening again in the future. **Your organization needs to have its own incident reporting and investigation procedures, and everyone must know and follow them.**



Incident reporting

Internal reporting procedures

Alberta's occupational health and safety laws don't set out any requirements for internal incident reporting procedures. Employers should set up the processes that will work best for their organization.

However as an employer, you have to know about incidents at your work site. Simply put, if you don't know an incident has occurred, you can't take important steps to prevent similar incidents in the future.

Also, you won't be able to fulfill any legal reporting requirements that may apply.

Reporting requirements depend on the nature of the incident – make sure your internal reporting procedures will give you the timely information you need to carry out your obligations.

Internal reporting procedures can include:

- The types of incidents that need to be reported.
- How to report an incident.
- Timelines for incident reporting.
- What happens after the incident is reported.

Reporting requirements to consider

Section 33 of the *Occupational Health and Safety Act* sets out requirements for reporting certain types of incidents to OHS. Those requirements are introduced on the next three pages.

Note that reporting incidents to OHS is separate from any notice you are required to give to the Alberta Workers' Compensation Board or other local authorities, such as the police. **Consult other authorities directly to find out their reporting requirements.**

Communicate your procedures

Whatever your internal procedures are, ensure your workers and supervisors know and understand them. Follow up if you think that incidents aren't being reported. Making improvements and fixing problems starts with knowing there are issues.

Consistent incident reporting is a vital part of your health and safety system.

Reporting to OHS

As an employer, you must notify OHS about certain incidents (unless there is a prime contractor, in which case they must report the incident).

If you're not sure whether you have to notify OHS, call 1-866-415-8690.



Serious injuries, illnesses or incidents

Call the OHS Contact Centre (1-866-415-8690) as soon as possible if:

- A worker has died at work, or from an injury or illness connected to the work site.
- You believe a worker has been or will be admitted to hospital (beyond treatment in an emergency room or urgent care facility) because of a workplace injury, illness or incident.
- There has been:
 - An unplanned or uncontrolled explosion, fire or flood that caused or could have caused a serious injury or illness.
 - A crane, derrick or hoist collapse or upset.
 - A (full or partial) building or structural collapse or failure.

No one is allowed to disturb the scene of a serious injury, illness or incident described above, unless:

- An OHS officer or police officer give you permission.
- You need to attend to a person who is injured, ill or killed.
- You need to prevent further injuries, illnesses or incidents.
- You need to protect property endangered by the incident.

If you're not sure, call the OHS Contact Centre at 1-866-415-8690.



Radiation overexposures

Call the OHS Contact Centre at 1-866-415-8690 as soon as possible to report that a worker has been exposed to radiation above the limits set out in Schedule 12 of the Occupational Health and Safety Code.

Read more in *Personal exposure monitoring for ionizing radiation* in **Additional resources** (Incident reporting and investigation).



Mine or mine site incidents

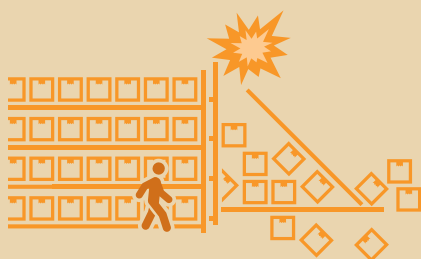
Report online to OHS as soon as possible if there has been a mine or mine site incident described in Section 544 of the Occupational Health and Safety Code. Report at **oirportal.labour.alberta.ca/pre-screening**.



Potentially serious incidents

Report online to OHS by providing your potentially serious incident investigation findings at **oirportal.labour.alberta.ca/pre-screening** when your investigation is complete.

A potentially serious incident is any event that had a likelihood of causing a serious injury or illness, where there is reasonable cause to believe that corrective action may be needed to prevent recurrence. For example:



A worker is walking through the food bank doing regular inventory work. Suddenly, a shelving unit two rows away collapses. Heavy product crashes to the floor. If the worker had been working where the shelving structure collapsed, it's likely they would have been seriously injured. In other words, luck was all that prevented the worker from a serious injury. Controls are needed to prevent a recurrence.

A potentially serious incident is not limited to workers, and it does not need to involve an injury. If someone who isn't a worker is involved, it's a potentially serious incident if it resulted from activities at the work site or could have happened to a worker.

You can learn more by reading the *Incident reporting and investigation* bulletin in **Additional resources** (Incident reporting and investigation) or by visiting **alberta.ca/ohs-complaints-incidents**.

Reporting to OHS: overview

This table summarizes the information on the previous two pages. Refer to those pages for more information.

Call OHS at 1-866-415-8690 if you're not sure if you have to report an incident.



Call OHS 1-866-415-8690 as soon as possible if there has been:

- A worker fatality at the work site.
- A workplace injury, illness or incident that resulted in:
 - a worker fatality,
 - a worker being admitted to hospital , or
 - a worker injury or illness that the employer believes may lead to hospital admission.
- An unplanned or uncontrolled explosion, fire or flood that caused or could have caused a serious injury or illness.
- A crane, derrick or hoist collapse or upset.
- A (full or partial) building or structural collapse or failure.
- A worker overexposed to radiation.



Report online to OHS if there has been:

- A mine or mine site incident.
- A potentially serious incident.

Report mine or mine site incidents as soon as possible.

Report potentially serious incidents after your investigation is complete.

oirportal.labour.alberta.ca/pre-screening

Incident investigation

After all reporting requirements have been met, the focus shifts to figuring out exactly what happened and why.

Unless there is a prime contractor, you must investigate all reportable incidents, including potentially serious incidents. This is a legal requirement.



... the prime contractor or, if there is no prime contractor, the employer shall ... carry out an investigation into the circumstances surrounding the injury, illness, incident or worker exposure,

Occupational Health and Safety Act, Part 7, Section 33(6)(a)

An investigation is a fact-finding mission in which the employer collects information about the incident to analyze and determine how it happened. Once you have a complete picture, you can start to look at why the incident happened.

Investigation procedures need to be in place so that everyone understands their responsibilities **before** an incident occurs.



Your investigation procedures should consider components such as:

- ☐ Investigation goals and timelines.
- ☐ Who is responsible for the investigation.
- ☐ Who will participate in the investigation.
- ☐ What information can be included in the investigation report.
- ☐ How information is collected, recorded and secured during the investigation.
- ☐ Who writes the investigation report.
- ☐ Who receives the investigation report.
- ☐ Who follows up on corrective action.
- ☐ Where the investigation report will be stored and for how long.

The goal of an investigation

An incident investigation looks at what caused the incident. Many incidents have more than one cause. **Identifying all the causes of an incidents tells us what changes we need to make so that it doesn't happen again.**

There are a number of models you can use to identify incident causes. These range from simple domino models to complex models such as root cause analysis.

The simple model shown below groups incident causes into five categories.

- **Task** looks at the work procedures being used the time of the incident.
- **Material** asks if equipment and materials contributed to the incident.
- **Environment** considers the physical work environment.
- **Personnel** asks relevant questions about the people directly involved in the incident.
- **Management** looks at organizational factors, such as management systems, hazard assessment and control processes, or worker orientation or training.

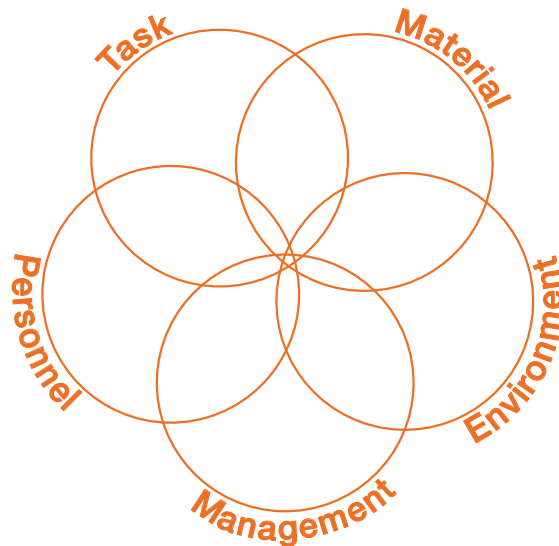


Illustration: Canadian Centre for Occupational Health and Safety

Investigators who use this model ask questions about each category, so they can identify all the reasons an incident happened. Note that there need not be causes in each category, and there can be multiple causes in one category.

Incident investigations are an important part of an organization's commitment to improve its health and safety performance. If corrective actions have been identified, they must be implemented to be effective. **Share any changes with workers.**

Incident investigation reports

By law, you must prepare a report that outlines:

- The circumstances of any reportable incident, including potentially serious incidents.
- The corrective actions taken, if any, to prevent a recurrence.

(If there is a prime contractor, it is their responsibility to prepare and distribute the report.)

You can modify the incident investigation report template on page 89 to help you collect information about the circumstances, work through the causes, and identify what corrective actions you need to take. **But keep in mind that some of the facts that you collect may include personal information.**

Make sure you and your investigation team understand requirements related to personal information, and collect and manage personal information accordingly.

Do not include personal information in the report. This includes names and contact information of persons involved in the incident, witnesses and investigators.

Privacy laws govern personal information sharing. If you believe personal information is necessary in your report, make sure it is authorized under privacy law.



Distributing the report

Legal requirements

You must distribute and retain the investigation report for a reportable incident according to occupational health and safety law.

You must provide a copy of the investigation report to the health and safety committee or representative, if there is one. If there is no committee or representative, you must make the copy available to your workers.

- Note that this distribution requirement does not apply to violence and harassment incident investigation reports. (See page 104.)

You must provide a copy of the investigation report to OHS.

- Provide fatality, serious injury, illness or incident investigation reports to an OHS officer on request.
- Provide reports for mine, mine site or potentially serious incidents **online** at **[oirportal.labour.alberta.ca/pre-screening](https://portal.labour.alberta.ca/pre-screening)**.
- When you notify the OHS Contact Centre of a radiation overexposure, the contact centre will direct you on how to submit your investigation report.

You must keep a copy of the report readily available for at least two years after the incident. If an OHS officer requires a copy of the completed report, you must provide it to them on demand.

Voluntary distribution

The report distribution required by occupational health and safety law doesn't prohibit you from distributing additional copies of the report, if you need to. Your organization's needs and investigation procedures may include distributing the investigation report to different parties. For instance, managers or supervisors who are responsible for taking corrective actions may need a copy of the report to better understand what they have to do and why changes are needed.

Make sure that any voluntary report distribution you do complies with privacy laws.

Incident reporting and investigation

Here's one example of incident reporting and investigation at a work site with no prime contractor.



Incident occurs.

Example: A worker was struck by a temporary fence that blew over in a strong wind. The worker suffers injuries, receives first aid on site, and 911 is called. The worker is admitted to hospital.

1 Employer learns about the incident.



Employer reports the incident to Alberta OHS. Employer doesn't disturb the scene until OHS releases it. (See page 81.)



Employer completes a first aid record. (See page 96.)

2 Employer investigates the incident to determine causes.



ENVIRONMENT

Wind.



MATERIAL

Temporary fence was not properly secured.



MANAGEMENT

Temporary fences weren't included in the site inspections.

3 Employer plans and implements corrective actions.



Bracing or ground anchors are added to ensure temporary fencing is secure, including in strong winds. (In the interim, employer directs workers to avoid working by the fences.)



Procedures for inspecting temporary fencing are developed and put in place.

4 Employer creates an investigation report.



Employer distributes and retains the report as required by law. (See page 87.)

Incident investigation report (template)

This is one example of an incident investigation report template. You can find a Microsoft Word version of this report template in *Occupation health and safety starter kit: template package* in **Additional resources** (General). **If you choose to use this template, make sure you customize it to your work and work site.**

Date and time of incident: AM ___ PM ___

Incident location: *(Include site address.)*

Date the incident was reported to OHS: *(Indicate if not applicable.)*

Legal name of employer/prime:

Other parties involved in the incident: *(Indicate if not applicable.)*

Incident category: *(Choose all that apply. Refer to Section 33 of the OHS Act for specifics.)*

fatality ___	collapse/failure of structure or building ___	radiation overexposure ___
hospitalization ___	mine or mine site incident (Section 544 of the OHS Code) ___	potentially serious incident ___
crane/derrick/hoist collapse ___		other: _____
unplanned fire/explosion/ flood ___		

Circumstances of injury, illness, incident or worker exposure

(Follow the prompts below to describe the circumstances of the incident. Add or delete sections as needed. Do not include personal information (e.g., names, job titles, details of injury or illness) unless it is necessary and permitted by privacy law.)

Sequence of events *(List what happened, in chronological order. Include visual aids such as sketches or diagrams if those help describe the incident.)*

-
-

Work activities *(Describe how many people were involved and in what capacity: for example, Worker One was doing task A; Worker Two was doing task B; Supervisor was doing task C.)*

-
-

Tools, material, equipment *(Include any relevant information: for example, condition, maintenance history, date last used, manufacturer's specifications, safeguards, personal protective equipment.)*

-
-

Work site conditions *(Describe relevant conditions: for example, weather, harmful substances in use, noise, lighting, time of day, confined/restricted space, ergonomics.)*

-
-

Incident reporting and investigation

Organizational factors (Describe relevant systemic factors, such as communication methods, training for work activities, safe work procedures, hazard assessment and control, supervisory requirements.)

-
-

Other circumstances (Describe any other circumstances relevant to the incident.)

-
-

Circumstances	Corrective action required	Assigned to (position)	Date completed
(List each identified circumstance that contributed to the incident. One per row. Add or delete rows as needed.)	(Record "not applicable" if no action is required.)		

Date report completed:

Date report provided to health and safety committee/representative/workers:

(Indicate if not applicable.)

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Incident investigation report (sample)

Date and time of incident: *Monday, March 17, 2025* 2:15 AM ___ PM X

Incident location: *Lunchroom, 212 XYX Street, Our town*

Date the incident was reported to OHS: *Monday, March 17, 2025*

Legal name of employer/prime: *Alberta 123456 Ltd.*

Other parties involved in the incident: *Not applicable*

Incident category: (Choose all that apply. Refer to Section 33 of the OHS Act for specifics.)

fatality ___

collapse/failure of structure
or building ___

radiation overexposure ___

hospitalization X

mine or mine site incident
(Section 544 of the OHS
Code) ___

potentially serious incident ___

crane/derrick/hoist
collapse ___

other: _____

unplanned fire/explosion/
flood ___

Circumstances of injury, illness, incident or worker exposure

Sequence of events

- A manager asked a maintenance worker to apply a fresh coat of paint to the interior walls of the lunchroom.
- The worker used a 30-metre extension ladder to edge the top of the wall.
- When the worker reached the top of the ladder, the bottom slid out, away from the wall.
- The ladder and the worker fell to the ground.

Work activities

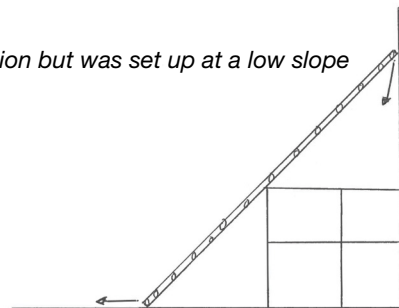
- The worker involved in the incident was climbing the ladder to paint.
- There was no-one else in the lunchroom at the time of the incident. Another worker was working in the hallway.

Tools, material, equipment

- A scissor lift was available but wasn't used.
- The ladder involved in the incident was in good condition but was set up at a low slope (see below) and not secured.

Work site conditions

- A number of boxes were piled up at the base of the wall that the worker was edging.
- The ladder was set up at a very low slope to reach over these boxes. (See sketch at right.)



Incident reporting and investigation

Organizational factors

- Some maintenance workers haven't been trained in scissor lift operation and don't know how to use that equipment.
- Site inspections are ad hoc.
- Ladder safe work procedure (SWP) doesn't describe all set up requirements.

Other circumstances

- Not applicable

Circumstances	Corrective action required	Assigned to (position)	Date completed
Scissor lift was available but not used.	Senior management direct managers and supervisors to: 1) only assign maintenance workers with aerial lift training to working from height tasks that can be carried out using a scissor lift, and 2) make sure the assigned worker uses the scissor lift for those tasks.	Director	March 19, 2025
	Manager and the health and safety committee revise the maintenance worker hazard assessment to make it clear that the scissor lift is an engineering control (required first choice) for working at height in areas accessible to the lift.	Operations manager	March 20, 2025
	Maintenance supervisor review the revised hazard assessment with their team.	Maintenance supervisor	March 21, 2025
Maintenance worker had not received aerial lift training.	Manager to schedule all maintenance workers for aerial lift training. (The training must be completed by April 17, 2025.)	Operations manager	March 24, 2025
Extension ladder wasn't secured against movement or set up at a 4:1 ratio.	Update ladder SWP with proper setup requirements.	Operations manager	March 19, 2025
	Supervisor review the updated procedures with the maintenance team.	Maintenance supervisor	March 21, 2025
	Management instruct supervisors to ensure that the procedures are followed going forward.	Director	March 19, 2025
Boxes stacked in lunchroom.	Company managers and supervisors setup and implemented a daily site inspection schedule to make sure materials aren't building up or causing a hazard on site.	Director	March 21, 2025

Date report completed: March 27, 2025

Date report provided to health and safety committee: March 27, 2025

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First aid

Alberta law requires prime contractors (or the employer, if there is no prime contractor) to provide first aid measures at every work site.

Part 11 of the Occupational Health and Safety Code sets out workplace first aid requirements.

Prime contractors or employers must consider the following first aid requirements:



first aid
services



supplies, equipment
and kits



records



communication



emergency
transportation

Your first aid requirements are unique to your work site

To determine the number of first aiders, the level of first aid training, and the first aid supplies, equipments and kits required at your work site, consider the following:

1. The hazard level of the work performed at the work site



low



medium



high

2. The number of workers per shift

3. The distance of the work site to the nearest health care facility



close

up to 20 minutes
under normal travel
conditions



distant

20 to 40 minutes
under normal travel
conditions



isolated

more than 40 minutes
under normal travel
conditions

Refer to Schedule 2 of the Occupational Health and Safety Code to determine the number and amount of first aiders, training, first aid equipment, supplies and kits required at your work site. The schedule also sets out first aid room requirements.

First aid



Your first aiders are essential

A prime contractor (or the employer, if there is no prime contractor) must ensure that the number of first aiders at a work site and their qualifications and training comply with the legislation.

A workplace first aider must successfully complete training provided by an approved training agency. For a list of approved first aid training agencies, visit alberta.ca/first-aid-training.



Have a plan for emergency transportation of workers

Advance planning is required. As a prime contractor (or the employer, if there is no prime contractor) **you must have arrangements in place for the transport of ill or injured workers** to a health care facility where medical treatment is available, before work can begin at any work site.

You must consider hazards such as:



distance from
health care facilities



work exposures
that require
specialty treatment



weather
conditions

In some situations, your emergency transportation plan might be as straightforward as calling an ambulance. In others (for example, if people are working alone or working in more remote locations), your plan for emergency medical transport will need to have more detailed procedures and specific contact information.



Communicate details with all work site parties

Make sure everyone at the work site knows important first aid details such as:

- Who the designated first aiders are.
- How to summon the first aiders.
- Where first aid kits, supplies and equipment are located.
- What type of transportation is available to get ill or injured workers to medical care.
- When and how to summon transportation.



Make sure workers have access

Workers must have access to first aid services, supplies, equipment and kits, along with a first aid room if one is required by the Occupational Health and Safety Code. **All first aid kits, equipment and supplies must be properly stored and maintained** so they remain ready for use: clean, dry and in serviceable condition.



Good record keeping is good business

Written records must be developed and maintained as part of first aid planning.

The records to include are:

- The names of first aiders, including their certificates and training records.
- First aid kit, supply and equipment requirements.
- Illness or injury records. (See the next page.)
- Procedures for communication, including how to summon help.
- Transportation plans for getting ill or injured workers to medical treatment facilities.

These records are important for administrative purposes and to meet legal requirements.

Illness or injury records are required

If a worker has an illness or injury that requires emergency care at the work site, that worker must report the illness or injury to the employer as soon as possible.



Required documentation

Employers must keep records documenting every illness or injury that occurs at the work site. The employer must record the details as soon as possible after the worker reports the illness or injury. The employer's record must include:

- The ill or injured worker's name.
- A description of the illness or injury.
- First aid given to the workers.
- The first aider's name and training level.
- The date and time the illness or injury occurred.
- The date and time the illness or injury was reported or the employer otherwise became aware of the illness or injury.
- Where the illness or injury occurred at the work site
- The work-related cause of the illness or incident, if any.

These records must be kept on file for three years from the date the incident was recorded. The records must be kept confidential (with some exceptions). If a worker asks for a copy of their own records, the employer must give it to them.

An illness or injury record template is provided on the next page for reference. **You should customize this to meet your organization's specific needs.** Make sure it meets all legislated requirements.

Learn more by reading *First aid in the workplace* in **Additional resources** (First aid).

Illness or injury record (template)

This template is provided for example purposes. You can find a Microsoft Word version of this illness or injury record template in *Occupation health and safety starter kit: template package* in **Additional resources** (General). **If you choose to use this template, make sure you customize it to your work and work site.**

Date of illness or injury: (month/day/year) Time: AM ____ PM ____

Date illness or injury reported, or the employer otherwise became aware of the illness or injury: (month/day/year) Time: AM ____ PM ____

Full name of ill or injured worker:

Description of the illness or injury:

Where on the work site the illness or injury occurred:

Work-related cause of the illness or injury, if any:

Was first aid provided? YES ____ NO ____

(If yes, complete the next four sections. OHS Code Section 184 requirements apply.)

Name of first aider:

First aider qualifications:

(*Must be from an approved training agency.)

Basic first aid certificate* ____	Emergency medical responder ____	Nurse with an advanced first aid certificate* ____
Intermediate first aid certificate* ____	Primary care paramedic ____	
Advanced first aid certificate* ____	Advanced care paramedic ____	

Describe first aid provided:

Worker requested and was provided a copy of this report ____

Ill or injured worker initial ____

Keep this record confidential.

Retain for at least 3 years from date the illness or injury was reported/employer became aware of the illness or injury.

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Violence and harassment prevention

Violence and harassment can take place at any work site, and can range from disrespectful remarks to physical aggression. These are serious issues that create an unhealthy and unsafe work environment, and can make it impossible to perform one's job.



Violence, whether at a work site or work-related, means the threatened, attempted or actual conduct of a person that causes or is likely to cause physical or psychological injury or harm, and includes domestic or sexual violence.

Harassment means any single incident or repeated incidents of objectionable or unwelcome conduct, comment, bullying or action by a person that the person knows or ought reasonably to know will or would cause offence or humiliation to a worker, or adversely affects the worker's health and safety, and includes

- (i) conduct, comment, bullying or action because of race, religious beliefs, colour, physical disability, mental disability, age, ancestry, place of origin, marital status, source of income, family status, gender, gender identity, gender expression and sexual orientation, and
- (ii) a sexual solicitation or advance,

but excludes any reasonable conduct of an employer or supervisor in respect of the management of workers or a work site.

Occupational Health and Safety Act, Part 1, Section 1

There's no place for violence and harassment

Keeping a workplace free from violence and harassment is a shared responsibility.

Employers must take steps to eliminate or control the hazards of violence and harassment in the workplace. They must also address incidents when they occur.

Supervisors must ensure, as far as reasonably practicable, that none of the workers under their supervision are subjected to or participate in violence or harassment.

Workers must not to cause or participate in workplace violence or harassment.

Workplace violence includes:



physical assault
or aggression



threats of
physical harm



sexual violence

Workplace harassment includes:



discrimination



setting a person
up to fail



exclusion or
isolation



intimidation



cyber bullying



unwelcome conduct,
comments, gestures
or contact



physical or
psychological
bullying



withholding or giving
false information



taking away
work or
responsibility



sexual
solicitation or
advances

Domestic violence can be a workplace hazard



When an employer is aware that a worker is or is likely to be exposed to domestic violence at a work site, the employer must take reasonable precautions to protect the worker and any other persons at the work site likely to be affected.

Occupational Health and Safety Code, Part 27, Section 390.3

Prevention starts with a plan

To ensure workplaces are free from violence and harassment, employers must develop and implement a violence and harassment prevention plan. The plan must be in writing and accessible to workers and the health and safety committee or representative (if applicable).

You must develop and implement the plan in consultation with the health and safety committee or representative, if there is one. If there is no committee or representative, you must consult affected workers, as far as reasonably practicable.



An employer must develop and implement a violence and harassment prevention plan

Occupational Health and Safety Code, Part 27, Section 390(1)



The violence and harassment prevention plan must include:

- Measures the employer will take to eliminate or (if that isn't reasonably practicable) control violence and harassment hazards.
- Procedures to inform workers about the nature and extent of the hazard of violence or harassment, including specific or general threats.
- Reporting procedures for violence or harassment.
- Investigation procedures for violence or harassment complaints and incidents.
- Provisions to protect the confidentiality of work site parties involved in complaints or incidents, except where disclosure is required by law or necessary to:
 - investigate the complaint or incident,
 - take corrective action,
 - inform involved parties about investigation results and any corrective action, or
 - inform workers of a specific or general threat of violence or potential violence.

To get you started, there is a violence and harassment prevention plan template at the end of this chapter.



Employers with the retail fuelling outlets or convenience stores must meet additional requirements when developing and implementing a violence and harassment prevention plan. For details, see *Fuel and convenience store employer guide* in **Additional resources** (Violence and harassment prevention).

Keep the plan current

Employers must review their violence and harassment prevention plan if any of these circumstances apply:

- An incidence of violence or harassment indicates a review is needed.
- A change in the work or work site could affect the potential for violence or harassment.
- The health and safety committee or representative requests a review.
- There hasn't been a review in three years.

The review should focus on whether the plan is current and if there are any deficiencies or gaps to address.

Employers must revise the violence and harassment prevention plan as needed after a required review.

Consult workers

Employers must consult the health and safety committee or representative (as applicable) when developing, implementing or reviewing their violence and harassment prevention plan.

If there is no committee or representative, the employer must consult affected workers, as far as reasonably practicable.

Inform workers about threats

Meeting the employer requirement to prevent violence and harassment includes having processes in place to warn workers about any specific, general or potential threats. Your prevention plan must include a provision that states that you can disclose workplace violence or harassment information when you need to warn workers about threats.

Workers need training

The minimum training requirements for workers in relation to violence and harassment prevention are as follows:



An employer must ensure that workers are trained in

- (a) the recognition of violence and harassment,
- (b) the violence and harassment prevention plan the employer has developed and implemented under section 390(1), including when revisions are made to the plan,
- (c) the appropriate response to violence and harassment, including procedures for obtaining assistance, and
- (d) the procedures for reporting, investigating and documenting complaints and incidents of violence and harassment.

Occupational Health and Safety Code, Part 27, Section 391



Investigate and report incidents

The employer must conduct an investigation of any incident of violence or harassment, and take any corrective actions that are necessary to address the incident and prevent it from happening again.

You must prepare an investigation report outlining the circumstances of the incident. If any corrective actions were required, you must also describe those in the report.

This report must be kept on file for at least two years following the incident. During that time, it must be readily available to share with an OHS officer upon request.

Incidents that involve violence or harassment are often sensitive and personal in nature. Investigations must reflect this, both in how they're carried out and how they're reported. And unlike other incident investigation reports, violence or harassment incident investigation reports do not have to be distributed to the health and safety committee, health and safety representative or other workers (as applicable).

As a best practice, the people tasked with investigating violence and harassment incidents should have special training, including understanding privacy laws, and when it is appropriate or required to share personal information.

Recommend follow-up treatment

Workers who have suffered from workplace violence or harassment might benefit from treatment from a health professional of the worker's choice. **Employers must advise any worker who reports an injury or adverse symptom related to an incident of workplace violence or harassment to contact a health professional.**



An employer must ensure that a worker reporting an injury or adverse symptom resulting from an incident of violence or harassment is advised to consult a health professional of the worker's choice for treatment or referral.

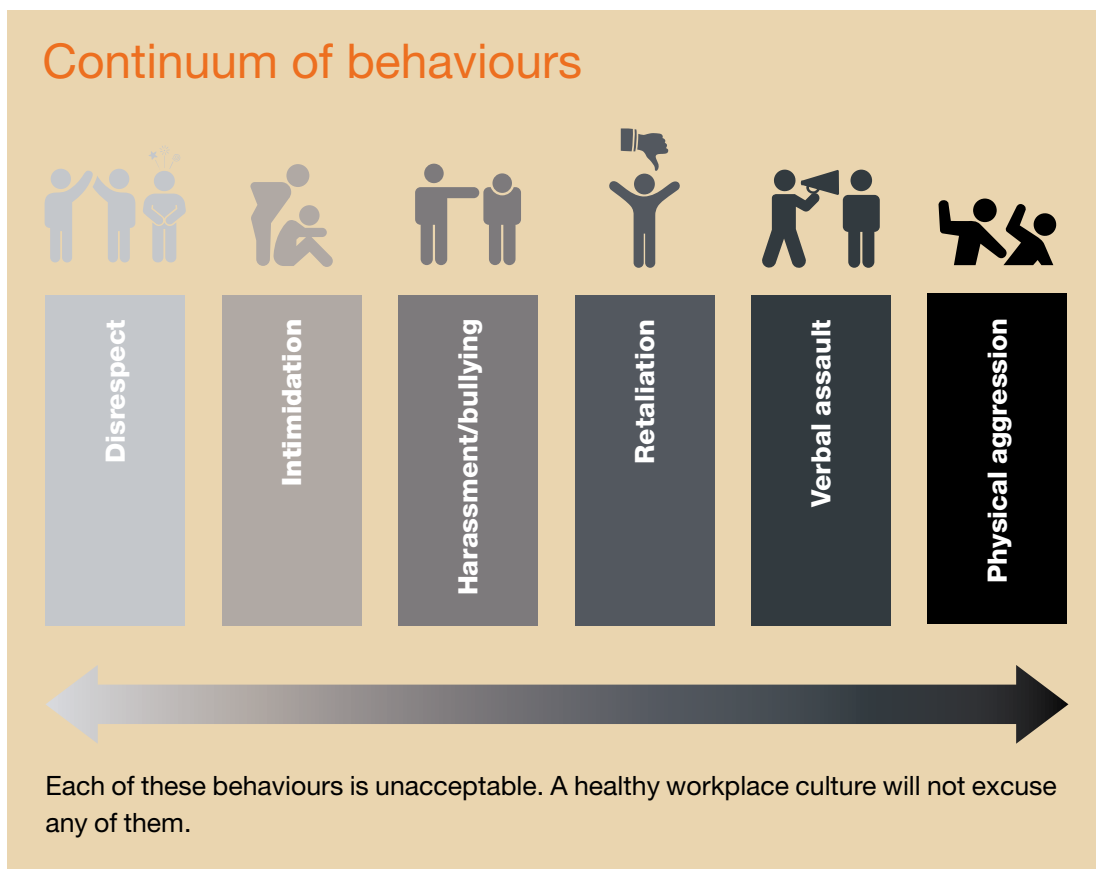
Occupational Health and Safety Code, Part 27, Section 391.2

When a worker is treated by a physician (or further to a physician's referral) during regular working hours in relation to an incidence of violence or harassment, the worker is deemed to be at work during that treatment.

Note: the obligation to consider the worker as being at work during the treatment only applies at the work site where the incident occurred, not future employers.

Stop it in its tracks

Addressing issues early on can prevent acts of bullying and harassment from progressing to acts of violence. Of course, not all incidents are foreseeable. Acts of physical violence can happen without warning.



For more information, see the *Violence and harassment in the workplace* bulletin in **Additional resources** (Violence and harassment prevention).

Violence and harassment prevention plan (template)

This is one example of a violence and harassment prevention plan template. You can find a Microsoft Word version of this template in *Occupation health and safety starter kit: template package* in **Additional resources** (General). **If you choose to use this template, make sure you customize it to your work and work site.** Note that this template addresses Section 390(1), OHS Code requirements only. There are other requirements in Part 27 of the code. It's recommended that you include those in your violence and harassment prevention plan as appropriate.

Employer name:

Date:

Next scheduled review date: *(Maximum of three years.)*

HSC or HS representative consulted, if there is one: YES__ NO__ N/A__

Affected workers consulted, if no HSC or HS representative: YES__ NO__ N/A__

Required prevention plan content

Measures the employer will take to eliminate or control violence and harassment

hazards: *(These must comply with all hazard assessment and control requirements in Part 2 of the OHS Code. If you are a retail fuelling outlet or a convenience store, you must also include the controls required in Section 392.2 of the code.)*

-
-

Procedures for informing workers about the nature and extent of violence and harassment hazards, including information about specific or general threats that exist or may exist:

-
-

Violence and harassment reporting procedures: *(These must include procedures for reporting incidents where required under Section 33(1) of the OHS Act.)*

-
-

Procedures for investigating complaints and incidents of violence and harassment:

(These must include your internal complaint resolution process, as well as the investigation requirements of Section 33(6)(a) to (c) of the OHS Act.)

-
-

Provisions to protect the confidentiality of all parties involved in a complaint or incident, except where disclosure is either required by law or necessary to investigate the complaint or incident; take corrective action; or inform involved parties about investigation results and any corrective action taken:

-
-

This form is for example purposes only. Completing this form alone will not necessarily put you in compliance with the legislation. It is important and necessary that you customize this document to meet the unique circumstances of your work site. Further, it is essential that this document is not only completed, but is used, communicated and implemented in accordance with the legislation. Neither the Crown, nor its agents, employees or contractors, will be liable to you for any damages, direct or indirect, arising out of your use of this form.

Obligations to others on site

Remember that as an employer, your responsibilities don't end with your workers. By law, employers must ensure – as much as reasonably practicable – that all people at or in the vicinity of the work site are protected from any identifiable dangers that can be controlled.



Every employer shall ensure, as far as it is reasonably practicable for the employer to do so,

- (a) the health, safety and welfare of ...
 - (ii) those workers not engaged in the work of that employer but present at the work site at which that work is being carried out, and
 - (iii) other persons at or in the vicinity of the work site whose health and safety may be materially affected by identifiable and controllable hazards originating from the work site,

Occupational Health and Safety Act, Part 1, Section 3(1)(a)(ii, iii)



Persons at or in the vicinity

Sometimes hazards that originate at the workplace can affect people who are at or close to a work site, even if those people aren't workers. Think outside the box to make sure you identify these.



falling
construction
debris



chemical leak in
building sends poisonous
fumes through the
neighbourhood



release of harmful
substances from
high risk activities



lack of
traffic control
at a work site



unguarded openings
that a person could
fall through

In some cases, the controls that you put in place to protect your workers may protect non-workers as well. Examples include measures that limit dust, debris or sound at the source, or traffic control procedures for vehicles and people going in or out of the site.

In other cases, you may need controls that are specific for non-workers. One example is a visitor orientation process that makes sure people who are new to your site know the health and safety rules they have to follow. Examples of such rules could include requirements for visitors to stay in designated areas, or to be accompanied by a designated person from your organization. **As always, the specifics depend on the work site and work activities.**

Work together for the sake of everybody on site

Work sites with multiple employers must work together to co-ordinate their health and safety responsibilities. If you are an employer at a work site with a prime contractor, this includes working co-operatively with the prime contractor.

Site-specific health and safety procedures and processes will help control hazards and ensure consistency across the work site. Be sure to share the procedures with everyone on site.

Examples of procedures and processes that may require a co-ordinated, site-specific approach include:



hazard assessments



emergency response plans



inspection procedures and schedule



orientation and training



investigation procedures



Prime contractors are required when two or more employers are involved in work at construction sites, oil and gas sites, or other work sites or classes of work sites designated by an Alberta OHS director. The prime contractor's main role is coordinating health and safety on a work site with two or more employers.

For more information, see *Prime contractor role and duties* in **Additional resources** (Obligations to others on site).

If you're a contracting employer...

If you contract other employers to do work for you, and you direct the work of that employer in a manner that affects worker health and safety, **you have legal obligations as a contracting employer**. You must ensure that the employer you've contracted complies with their legal occupational health and safety obligations. And of course, your general duties as an employer still apply to you in your role as a contracting employer – for example, you must inform the employer you've contracted about any existing or potential work site hazards, and cooperate with everyone to ensure worker health and safety.

Here are some best practices you can consider, as a contracting employer.

Expect more from your contractors up front

Before contracting work out to other employers, you should consider how well they ensure occupational health and safety.

Your selection criteria should include health and safety pass/fail criteria to help screen prospects early on in the selection process. As an employer you may request documentation to help you evaluate a contractor's ability to comply with occupational health and safety obligations. There are also third-party health and safety evaluation services, and health and safety associations available to assist.



Examples of documents you can request and evaluate

- ☐ Health and safety program handbook or manual.
- ☐ Health and safety policy.
- ☐ Safe work policies and procedures.
- ☐ WCB information (premium rate statement, clearance letter, employer report card).
- ☐ Certificate of Recognition (COR).
- ☐ Hazard assessment and control reports.
- ☐ Safety meeting minutes, toolbox talks, or pre-job tailgate meeting records.
- ☐ Worker and supervisor training and certification records.

Note: This documentation may form part of the employer's contractor pre-qualification to help ensure other employers are equipped to address the health and safety requirements of the job. There may be other considerations depending on the nature of the work and the work site parties involved.

Monitor regularly

As well, your responsibilities include regularly monitoring the contractors you employ. You must ensure they are complying with the *Occupational Health and Safety Act* and Occupational Health and Safety Code, and cooperating with anyone carrying out a duty under the laws. Regular monitoring may include inspections or any other activity that verifies work site-specific health and safety rules are being followed.



Are you monitoring contractors at your work site?

YES NO

Do you have a formal inspection schedule that considers the type and nature of work being performed?

☐ ☐

Do you sometimes conduct unscheduled informal inspections?

☐ ☐

Do you assess the employer's performance against:

- their own written procedures?
- work site health and safety policies?
- occupational health and safety legislation?

☐ ☐☐ ☐☐ ☐

Do you have processes to deal with non-compliance?

☐ ☐

Note: These are suggested processes and should be modified to suit individual employer's needs depending on the type and duration of the work being performed.

WHMIS

About WHMIS

The Workplace Hazardous Materials Information System (WHMIS) is a national program for classifying and labeling hazardous workplace chemicals. It ensures workers have the information, education and training they need to work safely with hazardous chemicals.

WHMIS only applies to products that meet certain criteria under federal law. When a product meets the criteria, it is then referred to as a hazardous product.

If hazardous products are used in the workplace, you must ensure WHMIS requirements are followed. Provincial WHMIS requirements are set out in Part 29 of the Occupational Health and Safety Code.

This starter kit introduces the three main parts of WHMIS – labels, safety data sheets and training – with a focus on some basic requirements for employers.

For more information, see **Additional resources** (WHMIS).





Labels

WHMIS labels provide basic information on the nature of the hazardous product and the risks associated with its use, handling and storage. The two main types of WHMIS labels are supplier and work site labels.

Supplier labels: Suppliers must provide label information for a hazardous product they import or sell. Suppliers must apply their labels directly to containers (although in some cases modifications are permitted).

Supplier labels provide detailed information. Among other things, supplier labels identify:

- The hazard associated with the product.
- Directions for proper handling and storage.
- What to do in the event of harmful exposure.

If the hazardous product is always used in its original container with a legible supplier label, no other label is required.

Work site labels: When it is not practicable to use a supplier label, work site labels are required. For example, you must use work site labels when:

- A hazardous product is decanted into a new container for storage and later use (for example, bleach transferred into a spray bottle).
- A hazardous product is made on site for use at the work site.
- The supplier label is missing or can no longer be read.

Work site labels must include the product name (same as what is on the safety data sheet), safe handling procedures and a reference to the safety data sheet for the hazardous product.

As an employer, you must ensure hazardous products at your work site are properly labeled.

There are some exemptions to this requirement in Part 29 of the Occupational Health and Safety Code. Consult the legislation directly for more information.

Learn more about labels in **Additional Resources** (WHMIS).



Safety data sheets

Safety data sheets provide more detailed, technical information about a product's physical and chemical characteristics, its physical and health hazards, precautionary measures (prevention, responses, storage and disposal) and much more information.

A hazardous product that will be stored, used or handled in the workplace must have a safety data sheet, unless the supplier is exempt (under federal law) from the requirement.

Safety data sheets must comply with specific content requirements. Learn more in the resources listed in **Additional Resources** (WHMIS).

As an employer, you must:

- Prepare a safety data sheet for a hazardous product produced or manufactured at your work site.
- Ensure you obtain a supplier safety data sheet for a hazardous product you purchase, and that the safety data sheet is the current version at the time of purchase.
- Ensure safety data sheets are readily available at the work site to workers who may be exposed to a hazardous product, and to the health and safety committee or representative (if there is one).

There are some exemptions to these requirements in Part 29 of the Occupational Health and Safety Code. Consult the legislation directly for more information.

Significant new data

From time to time, new data or information on a hazardous product can change the product's WHMIS classification; the health and safety procedures required for its safe use, handling or storage requirements; and/or the response to harmful exposure. This is considered "**significant new data**".

Suppliers must keep safety data sheets current. If they become aware of significant new data before a safety data sheet is updated, they must provide this information along with the safety data sheet when they sell the product to a workplace.

As an employer, you must:

- Update supplier labels or work site labels with significant new data as soon as you receive that data from a supplier.
- Add significant new data to safety data sheets as soon as reasonably practicable, within 90 days of a supplier providing you with that data.



Worker training

Employers must provide WHMIS training for workers who work with or near a hazardous product. Appropriate WHMIS training protects a worker's health and safety on the job.

Section 397(1) of the Occupational Health and Safety Code sets out the minimum required content for WHMIS training. The training must include the following WHMIS and work site-specific information:

- The content required on supplier labels, work site labels and safety data sheets, and the purpose and significance of that information.
- Procedures related to any hazardous product used at the workplace.
 - How to safely store, use and handle the product.
 - What to do if there are fugitive emissions.
 - What to do if there is an emergency involving the product.

Additional training content will be required at some work sites:

- If an employer manufactures a hazardous product, their WHMIS training must also include safe manufacturing procedures.
- If applicable, the WHMIS training must also explain alternate modes of product identification used to label hazardous products in transfer systems (piping, conveyors, etc.) or reaction (process) vessels.

WHMIS training must also provide general information about WHMIS, its components, legislation and guidelines. It must also include additional work site-specific information, such as where safety data sheets and procedures are located.

The employer must consult with the health and safety committee or representative, if there is one, when developing and implementing procedures that are required as part of WHMIS training.

Some chemical products – including consumer products – are partially exempt from WHMIS labeling and safety data sheet requirements. **Employers must still provide training on health hazards, and the safe storage, use and handling of these products.**

Working alone

The law considers working alone a hazard. Employers must address working alone in their hazard assessment and implement health and safety measures to eliminate or control related hazards to workers.

A worker is considered to be **working alone** if they work alone at a work site where assistance is not readily available.

These situations could present hazards that require specific controls and applicable safe and healthy work procedures:

- Handling cash.
- Meeting clients away from a base office.
- Doing hazardous work.
- Travelling for work.
- Working out of public view.

Identify all the applicable hazards and eliminate them; or if it is not possible to eliminate them, introduce any necessary controls.

Employers with workers who work alone must:

- **Conduct a hazard assessment** to identify existing or potential health and safety hazards related to working alone.
- **Introduce health and safety measures** to eliminate or control any identified risk to workers.
- **Ensure workers are trained** in working-alone precautions.
- **Provide an effective means of communication** so workers working alone can reach out in an emergency.
- **Contact the workers at regular intervals** appropriate to the hazards associated with the work.

Working alone

An effective communication system is a required control. Anyone working alone must be able to contact their employer or someone capable of providing assistance in an emergency.



cell phone



check-in
schedule



panic alarm



2-way radios



personal
emergency
transmitter

You (or your designate) must check in as appropriate. Since electronic communication isn't a viable option in all locations, the law accepts other methods of contact, including physical visits to the worker.

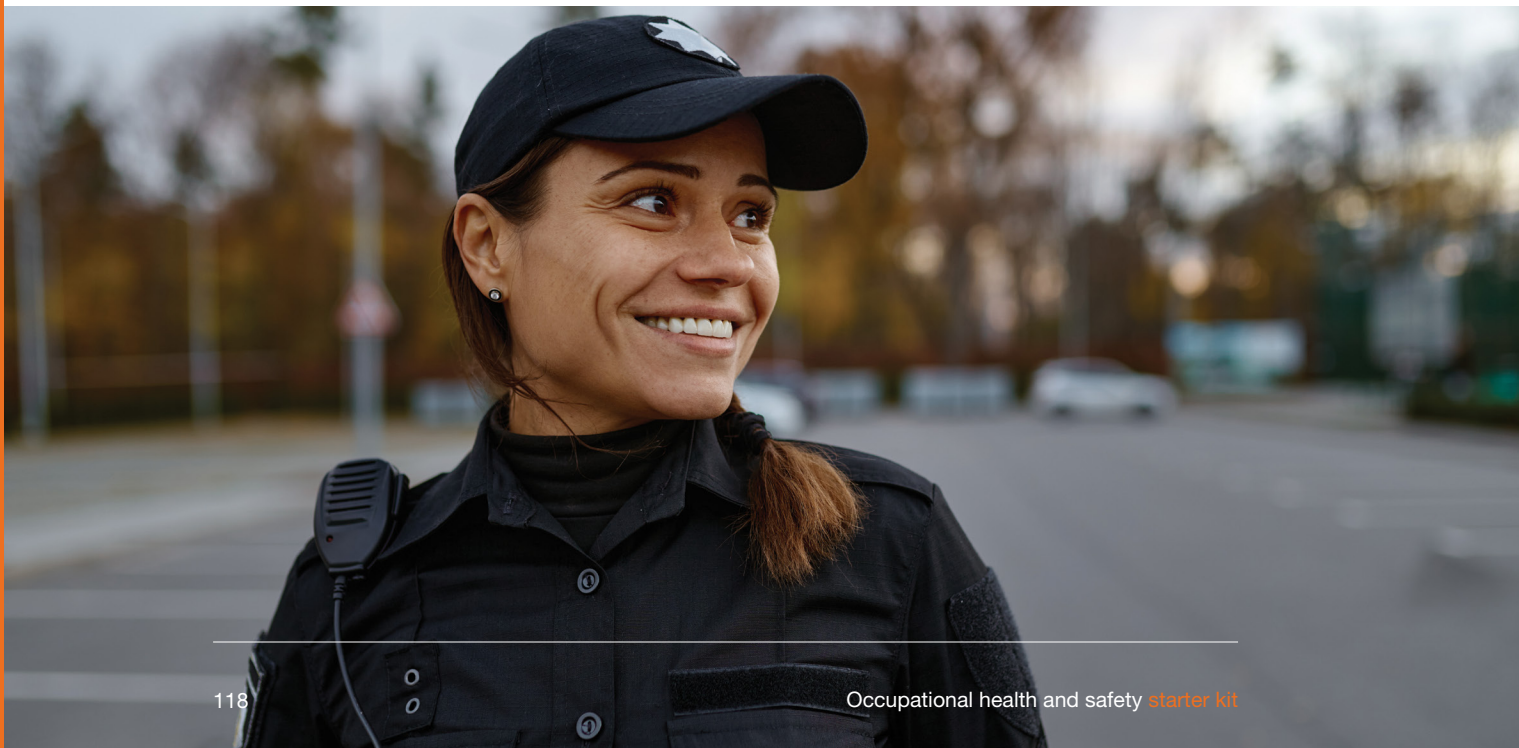


An employer must, for any worker working alone, provide an effective communication system consisting of

- (a) radio communication,
- (b) landline or cellular telephone communication, or
- (c) some other effective means of electronic communication

that includes regular contact by the employer or designate at intervals appropriate to the nature of the hazard associated with the worker's work.

Occupational Health and Safety Code, Part 28, Section 394(1)





How prepared are you/your workers?	YES	NO
Is there equipment in place to control hazards? (e.g. good lighting, limited public access)	<input type="checkbox"/>	<input type="checkbox"/>
Do you have methods in place to control hazards? (e.g. have procedures and signage for limiting cash and valuables on site)	<input type="checkbox"/>	<input type="checkbox"/>
Are workers informed of the hazards of working alone?	<input type="checkbox"/>	<input type="checkbox"/>
Are workers trained to work alone safely?	<input type="checkbox"/>	<input type="checkbox"/>
Do workers have an effective means of calling for help in an emergency?	<input type="checkbox"/>	<input type="checkbox"/>
Is somebody assigned to check in with the worker?	<input type="checkbox"/>	<input type="checkbox"/>
Does the person assigned know how often to check in?	<input type="checkbox"/>	<input type="checkbox"/>

Note: Your answers above may be an indicator of how prepared you are to have workers working alone. There are, of course, other questions you could ask. Make sure you think through and are prepared for any situations that could affect the health and safety of your worker.



Special provisions for retail fuel and convenience store workers

If a worker at a retail fuelling outlet or convenience store is working alone, the employer must provide a personal emergency transmitter monitored by the employer or the employer's designate. The personal emergency transmitter must be worn by the worker at all times while they are working alone.

For more information on working alone requirements, see **Additional resources** (Working alone).

Additional resources

Introduction

Government of Alberta – Guide to OHS: Employers

ohs-pubstore.labour.alberta.ca/li009

Government of Alberta – Guide to OHS: Supervisors

ohs-pubstore.labour.alberta.ca/li010

Government of Alberta – Guide to OHS: Workers

ohs-pubstore.labour.alberta.ca/li008

Government of Alberta – Domestic workers

ohs-pubstore.labour.alberta.ca/li069

Government of Alberta – Integrity in enforcement – Professionalism in the workplace

ohs-pubstore.labour.alberta.ca/bp034

Government of Alberta – Occupational health and safety: Farm and ranch

alberta.ca/farm-and-ranch-ohs

Government of Alberta – Right to refuse dangerous work

ohs-pubstore.labour.alberta.ca/li049

Government of Alberta – Role and duties of government OHS officers

ohs-pubstore.labour.alberta.ca/li046

Government of Alberta – What to expect in an OHS inspection

ohs-pubstore.labour.alberta.ca/ci007

Worker participation

Government of Alberta – Health and safety committees and representatives

ohs-pubstore.labour.alberta.ca/li060

Government of Alberta – Participation in health and safety for small business owners and workers

ohs-pubstore.labour.alberta.ca/li055

Health and safety program

Government of Alberta – Health and safety programs

ohs-pubstore.labour.alberta.ca/li042

Additional resources

Hazard assessment and control

Government of Alberta – Hazard assessment and control: a handbook for Alberta employers and workers

ohs-pubstore.labour.alberta.ca/bp018

Government of Alberta – Hazard assessment and control: eLearning

ohs-pubstore.labour.alberta.ca/el003

Emergency response plan

Government of Alberta – Emergency response planning: an occupational health and safety tool kit

ohs-pubstore.labour.alberta.ca/bp040

Government of Alberta – Emergency response planning: eLearning

ohs-pubstore.labour.alberta.ca/el004

Incident reporting and investigation

Government of Alberta – Incident reporting and investigation

ohs-pubstore.labour.alberta.ca/li016

Government of Alberta – OHS concerns and incidents

alberta.ca/ohs-complaints-incidents

Government of Alberta – Personal exposure monitoring for ionizing radiation

ohs-pubstore.labour.alberta.ca/rad008

First aid

Government of Alberta – First aid in the workplace

ohs-pubstore.labour.alberta.ca/fa020

Government of Alberta – First aid training

alberta.ca/first-aid-training

Violence and harassment prevention

Government of Alberta – Fuel and convenience store employer guide: violence and harassment prevention plan

ohs-pubstore.labour.alberta.ca/bp031

Government of Alberta – Violence and harassment in the workplace

ohs-pubstore.labour.alberta.ca/li045

Obligations to others on site

Government of Alberta – Prime contractor role and duties

ohs-pubstore.labour.alberta.ca/li018

WHMIS

Canada's National WHMIS Portal

whmis.org

Government of Alberta – WHMIS 2015 – Information for employers

ohs-pubstore.labour.alberta.ca/ch008

Government of Alberta – WHMIS 2015 – Information for workers

ohs-pubstore.labour.alberta.ca/ch007

Working alone

Government of Alberta – Working alone

ohs-pubstore.labour.alberta.ca/wa002

General

Government of Alberta – Employment standards tool kit for employers

alberta.ca/employment-standards-publications

Government of Alberta – OHS education and resources

alberta.ca/ohs-education-resources

Government of Alberta - Occupational health and safety starter kit: template package

ohs-pubstore.labour.alberta.ca/bp035tmp

Workers' Compensation Board – Alberta

wcb.ab.ca

OHS legislation

This starter kit is current to April 2025.

It references:

Occupational Health and Safety Act (current as of November 16, 2022)

Occupational Health and Safety Regulation (current as of December 1, 2021)

Occupational Health and Safety Code (current as of December 10, 2024)

Find the current occupational health and safety legislation online at:



alberta.ca/ohs-act-regulation-code

Purchase official printed versions of the *Occupational Health and Safety Act*, Regulation and Code Handbook from Alberta King's Printer:



alberta.ca/alberta-kings-printer



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