UTAH SAFETY CONSULTANT

SEND THREE TO FIVE DAYS AHEAD

Pre-visit pack

A short email you can copy, plus a document checklist for construction, mining, and trucking.

Send this three to five days before the visit. Copy the email, fill in the brackets, and attach or paste the checklist. Then mark “Document request sent” in App Step 2 Pre-audit.

Email you can copy

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Subject: Safety audit on [date] — documents to have ready

Hi [Name],

Thank you for scheduling the site safety audit at [site / project name] on [date].
I plan to arrive at [time], check in at [location], and start with a short opening
meeting with you or the superintendent.

This is an advisory visit, not an OSHA, MSHA, or DOT inspection. After the opening
meeting I would like to review records first (about 30–60 minutes), then walk the
site, and close with you before I leave. I will send a written report by [agreed
report date].

Please have the documents in the list below pulled together in an office or
conference room that day. I do not need to take originals off the site.

Would you also confirm:
• Where I should check in, and who my escort will be
• Required PPE and any orientation or badging
• Permission to take photographs of conditions for the report
• [If a mine:] site-specific hazard training and escort (30 CFR 46.11 / 48.31)

If something on the list will take time to gather, it still helps to know that
before I arrive. Call or email me with questions.

Thank you,
[Your name]
Utah Safety Consultant
435-901-9601
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Document checklist to include

Send the whole list, and tell the client to ignore sections that do not apply (for example, skip the mining section on a highway job with no mine).

All sites

- ☐ Written safety program or site-specific safety plan
- ☐ OSHA 300, 300A, and 301 logs for the last 5 years (or the equivalent you keep), and current-year 300A posting if it is February through April
- ☐ Training records and certifications (including competent person and orientation)
- ☐ Inspection logs (site, equipment, fire extinguishers, first-aid kits, harnesses, ladders)
- ☐ Hazard communication program, chemical list, and SDS (binder or electronic access)
- ☐ Equipment inspection and maintenance records
- ☐ Incident, near-miss, and investigation files for the last 3 years
- ☐ Any OSHA, UOSH, MSHA, or FMCSA citations, inspection reports, or insurer loss-control reports
- ☐ Emergency action / evacuation information and first-aid / clinic locations

Construction (add these)

- ☐ Fall protection plan or procedures, rescue plan, and competent person designation
- ☐ Excavation/trenching competent person and recent protective-system or tab data, if trenching is going on
- ☐ Crane and operator qualifications, recent inspections, and lift plans if a crane is on site
- ☐ Silica written exposure control plan if silica work is going on
- ☐ Site-specific safety plan or orientation packet for this project

Mining and heavy equipment (add these)

- ☐ MSHA 7000-1 and 7000-2 reports
- ☐ Part 46 or Part 48 training plan and 5000-23 (or Part 46 equivalent) records
- ☐ Workplace examination records for recent shifts
- ☐ Mobile equipment pre-operation and defect records
- ☐ Ground control / highwall examination records, if applicable

Trucking and transportation (add these)

- ☐ Driver qualification files (application, MVRs, previous-employer inquiries, road test, medical certificate, annual review)
- ☐ Hours-of-service / ELD records and a recent sample of logs
- ☐ Drug and alcohol program, testing records, and Clearinghouse documentation
- ☐ Vehicle maintenance files, DVIRs, and annual inspections
- ☐ Accident register

Utah Safety Consultant · Salt Lake City, UT 84103 · 435-901-9601 · Mon–Fri 9:00 AM – 5:00 PM

Templates and training tools only. Confirm regulations against the current CFR and any Utah (UOSH) state-plan rules. The client remains responsible for its own safety program and compliance. No credentials or licenses are claimed on these pages.