



CRITICAL TASK MANAGEMENT AUDIT CHECKLIST



Critical Task Management Audit Checklist

Purpose: Verify that the organization has identified its highest-risk work and has effective controls, procedures, training and field verification in place.

Company: _____

Completed by: _____

Date: _____

Next review: _____

Rating: ☐ Yes / Effective ☐ Needs Improvement ☐ No / Gap ☐ N/A

Audit Question A. CRITICAL TASK INVENTORY		Yes	Needs Improvement	No	N/A	Action Required / Owner / Due Date
1.	Has our Critical Task Inventory been formally reviewed within the last 12 months?	☐	☐	☐	☐	
2.	Have we considered changes since the last review, including new equipment, tools, processes, materials, projects, customers, locations or divisions?	☐	☐	☐	☐	
3.	Have we considered new or non-routine work our employees are now performing?	☐	☐	☐	☐	
4.	Does our list capture the work with credible potential for fatality, serious injury, lost time, occupational illness, major property damage or significant business loss?	☐	☐	☐	☐	
5.	Have we reviewed our incidents, near misses, hazard reports and WCB/Workers' Compensation claims for tasks that should be added or reprioritized?	☐	☐	☐	☐	
6.	Have we considered serious incidents and loss trends occurring at other companies in our industry, even if they haven't happened to us yet?	☐	☐	☐	☐	

7. Have supervisors and experienced field workers been asked: "What work concerns you most?"	☐	☐	☐	☐	
B. HAZARD ANALYSIS & SAFE WORK PROCEDURES	Yes	Needs Improvement	No	N/A	Action Required / Owner / Due Date
Does every critical task have a documented Job Hazard Analysis (JHA/JSA) or equivalent risk assessment?	☐	☐	☐	☐	
8. Does the JHA identify the significant hazards and appropriate controls for the task?	☐	☐	☐	☐	
9. Does every critical task have a written Safe Work Procedure (SWP/SOP) establishing how the work is to be performed?	☐	☐	☐	☐	
10. Do the procedures reflect how the work is actually performed today, rather than how it was performed when the procedure was originally written?	☐	☐	☐	☐	
C. REVIEW & CHANGE MANAGEMENT	Yes	Needs Improvement	No	N/A	Action Required / Owner / Due Date
11. Are JHAs and SWPs reviewed at the frequency required by the legislation, standard and/or company requirements applicable to our jurisdiction?	☐	☐	☐	☐	
12. Are procedures reviewed when legislation, regulations or applicable standards change?	☐	☐	☐	☐	
13. Are they reviewed following a relevant incident, near miss or significant hazard report?	☐	☐	☐	☐	
14. Are they reviewed when new equipment, materials, technology or processes change how the task is performed?	☐	☐	☐	☐	
15. Can we demonstrate when each document was reviewed, what changed and who approved it?	☐	☐	☐	☐	

D. TRAINING & COMPETENCY	Yes	Needs Improvement	No	N/A	Action Required / Owner / Due Date
16. Have employees performing each critical task been trained on the applicable JHA and Safe Work Procedure?	☐	☐	☐	☐	
17. Can we produce records demonstrating who was trained, on what and when?	☐	☐	☐	☐	
18. Where appropriate, do we verify competency, rather than relying solely on a worker reading/signing a procedure?	☐	☐	☐	☐	
19. Are new and inexperienced workers given the additional instruction, supervision and competency verification appropriate to critical work?	☐	☐	☐	☐	
E. FIELD VERIFICATION	Yes	Needs Improvement	No	N/A	Action Required / Owner / Due Date
20. Do supervisor/site walkabouts specifically include observations of critical tasks being performed?	☐	☐	☐	☐	
21. Do supervisors verify that workers are actually following the established critical-task controls and procedures?	☐	☐	☐	☐	
22. Are critical-task observations documented so management can identify repeat issues and trends?	☐	☐	☐	☐	
23. When non-compliance or a weakness is identified, is a corrective action assigned, tracked and closed?	☐	☐	☐	☐	
24. Does management periodically review critical-task performance to determine where standards, training, supervision or controls need improvement?	☐	☐	☐	☐	

Commercial Roofing / HVAC — Are We Missing Anything?

As a final check, specifically consider whether your operations include:

- ☐ Working at heights / leading edges / roof openings
- ☐ Ladders and access/egress
- ☐ Cranes, hoisting and rigging
- ☐ Mobile elevated work platforms
- ☐ Powered mobile equipment
- ☐ Energized electrical systems / hazardous energy / LOTO
- ☐ Confined spaces
- ☐ Hot work / welding / torching / roofing kettles
- ☐ Refrigerants, compressed gases and pressure systems
- ☐ Hazardous materials / silica / asbestos or other exposures
- ☐ Heavy or awkward material handling / musculoskeletal exposure
- ☐ Machine and equipment guarding
- ☐ Working around the public or other contractors
- ☐ Severe weather / heat / cold / wind
- ☐ Working alone
- ☐ Other company-specific critical task: _____

Important: This list is a prompt, not a universal critical-task list. The organization should determine its critical tasks based on the actual work and credible risk it faces.

Final Leadership Question

If a serious incident happened tomorrow while one of our critical tasks was being performed, could we demonstrate that we identified the risk, established the right standard, trained our people, verified competency, and consistently checked that the standard was being followed?

If the answer is **no** to any part of that question, you've probably just identified where to focus your next safety improvement.