Contractor Arrival Checklist

The pre-arrival gate. Every item verified before the contractor's first boot touches plant concrete.

Companion to: *Fix the System*, Chapter 12. **Who uses it:** the person operating the contractor check-in point (reception, security, shift supervisor on off-hours). **When:** before the contractor is badged and released to the floor, every visit, every time. **Authority to reject:** the gate operator can turn away any contractor who does not pass every item. Escalation for exceptions: the plant manager. Not the requesting supervisor.

Contractor details

Contractor company: ____

Crew lead on site today: ____

Number of crew: _________ Expected duration: _______________

Work to be performed (one sentence): ________________________________

Plant-side contact (named, present for the duration): __________________

Scheduled start: _____________ Scheduled end: _____________

The eight gates

Each item gets a plant-side initial in the box. Initial only after verification. A blank box means the contractor does not pass.

1. Certificate of insurance

- ☐ Current COI on file, not expired.
- ☐ Plant named as additional insured.
- ☐ Coverage limits meet plant contract minimums (general liability, workers comp, auto, umbrella as applicable).

Verified by: ________ Date verified: _____________

2. Safety history

- ☐ OSHA 300 log for the contractor's last three years reviewed by plant EHS.
- ☐ Review on file with date and reviewer name.
- ☐ Not used to reject. Used to brief the plant-side contact on the failure modes to expect.

Verified by: ________ Date verified: _____________

3. Training and certification (per technician)

For each technician on site today, verify certifications relevant to the work. Attach roster to this checklist.

- ☐ Crane operator (if lifting).
- ☐ Qualified rigger (if rigging).
- ☐ Confined space entrant / attendant / supervisor (if CSE).
- ☐ Electrical high-voltage qualified (if HV work).
- ☐ Refrigerant certified (if refrigerant work).
- ☐ Hot work trained (if hot work).
- ☐ All certifications current, not expired on day of work.

Verified by: ________ **Date verified:** ______________

4. Drug and background screening

- ☐ Contractor attestation on file that screening meets plant policy.
- ☐ Plant's right to audit confirmed in contract.
- ☐ Any technician who cannot attest is not badged.

Verified by: ________ **Date verified:** ______________

5. Site-specific orientation

Completed for every technician on every visit. Plant conditions change. Prior orientation does not carry over.

- ☐ Emergency evacuation routes walked or shown.
- ☐ Assembly points identified.
- ☐ Plant-specific hazards briefed (chemical handling, energized systems, overhead work areas, confined spaces, traffic zones).
- ☐ Stop-the-work authority explained: any plant employee can stop any contractor work at any time without justification.
- ☐ Orientation sign-off signed by the technician and countersigned by the plant orientation lead.

Verified by: ________ **Date verified:** ______________

6. Badge issued

- ☐ Contractor badge (not visitor, not employee) with clear contractor marking.
- ☐ Expiration date printed on badge, not open-ended.
- ☐ Expiration matches the scheduled end of the work plus a reasonable buffer, not a year out.
- ☐ Badge surrendered at sign-out at the end of the day.

Verified by: ________ **Date verified:** ______________

7. Chemicals and consumables (SDS)

- ☐ SDS submitted for every chemical, lubricant, solvent, cleaner, adhesive, or consumable the contractor is bringing on site.
- ☐ SDS reviewed by plant EHS for compatibility with plant systems and plant-side storage requirements.
- ☐ Any chemical EHS rejects is not brought in.

Verified by: ________ **Date verified:** ______________

8. Permit readiness

If the work requires a permit (hot work, confined space, LOTO, elevated work, pressure test, live electrical, excavation), the permit process is initiated before crew mobilization.

- ☐ Permit form started by the plant supervisor who requested the work.
- ☐ Contractor has filled out their portion (scope, crew, tools, hazards).
- ☐ Plant-side signature pending only final on-site verification.
- ☐ Permit will be signed by the plant-side contact, not by the gate operator.

Verified by: ________ **Date verified:** ______________

Gate decision

All eight gates initialed: the contractor is released to site, badged, and handed off to the plant-side contact.

Any blank gate: the contractor waits. Either the gap is closed now (documents produced, orientation completed, SDS submitted) or the contractor is turned around and rescheduled.

- ☐ **PASS.** All gates initialed. Contractor released.
- ☐ **HOLD.** Gate(s) incomplete. Reason: ____
- ☐ **REJECT.** Contractor turned around. Reason: ______________________________

Gate operator signature: __________________________ Time: ______________

Plant-side contact signature (at handoff): __________________________

Escalation

Any dispute about a gate decision routes to the plant manager. Not to the requesting supervisor. This rule matters. Requesting supervisors under time pressure will wave contractors through. The plant manager is the only person who can grant an exception, and only in writing, attached to this sheet.

Exception requested: ____

Plant manager signature: __________________________ Date: ______________

After the visit

File this checklist with the work order it corresponds to. Attach to the plant-side close-out at the end of the job.

Checklists filed in a drawer that nobody opens are worthless. The planner who writes the close-out needs this sheet to verify what was promised matches what arrived.
