

Task Preview: Prepare Before the Crew Briefing

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Why this matters

A useful briefing starts before everyone gathers. Each person can bring one important step, one control question and one difficulty from the work. Previewing the task gives the crew something specific to discuss. It also gives the leader time to obtain missing instructions, equipment or specialist help before anyone is exposed.

Objective: Prepare your part of today's work and bring a specific control question or unresolved condition to the crew briefing.

Key hazards or failure points

Starting from memory; using the wrong work package; missing a step that changes exposure; carrying yesterday's assumptions into today's assignment; keeping a concern until the job has started.

Practical controls

- Confirm your assigned task and role. Review the current work instruction and relevant JHA/JSA before the briefing. Obtain help if the documents or assignment are unclear.
- Identify the step where a mistake or missing control could cause serious harm. Consider the required starting condition, expected result and people affected. Do not invent a new work sequence.
- Bring a practical question: which control needs checking, what equipment is missing, or what made this job difficult last time? Raise it early enough for the team to resolve it.

Verify It in the Field

Match the work package's task, location and equipment identity to the assignment from a safe position. Confirm the applicable document version through the site's controlled-document process; a familiar title is insufficient.

Point to the instruction or permit that sets the selected step's prerequisite. Identify who is authorized to verify it and what evidence will be required. Mark the check pending until the actual result is available.

At the briefing, explain your question and have the leader identify its owner. Before the affected step, confirm the answer, required field-check result and any revised instruction. Record the finding and time; an assigned action is not a completed control.

Stop and reassess

Hold the affected work if the assignment conflicts with the instructions, a critical prerequisite is unknown, or the question remains unresolved. Seek the designated leader's help. After a significant delay or interruption, review what may have changed and repeat the checks the task requires before resuming.

Ask the crew

1. Which step deserves our closest preparation today?
2. What instruction or resource do we still need?
3. Who will resolve our question, and what evidence closes it?

Use the task plan and required specialist decisions before exposure.

Sources: DOE-HDBK-1028-2009, Vol. 2, pp. 6–7; OSHA Hazard Identification and Assessment; OSHA Hazard Prevention and Control.

Free next step: [JHA/JSA planning & field-verification worksheet](#)

Expanded guidance and separate forms: toddjeromejenkins.com/toolbox-talks/task-preview-before-crew-briefing

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