

Work Turnover: Transfer the State, Not Just the Story

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Why this matters

A task can change hands while important work remains unfinished. The incoming person needs more than a summary of what happened. They need the present condition, the remaining limits and the responsibilities they are accepting. A useful turnover makes differences visible before the next crew continues the affected work.

Objective: Reconcile work status, continuing protections and unresolved items, then make the transfer of responsibility explicit through the site's required process.

Key hazards or failure points

An incomplete step described as finished; changed equipment status missing from the log; temporary restrictions omitted; outgoing and incoming people both assuming the other owns a duty; a rushed or distracted exchange.

Practical controls

- Prepare the current task record: completed and remaining work, procedure position, equipment condition, restrictions, outstanding checks and contacts. Include changes since the last briefing and other work that affects this task.
- Outgoing and incoming people discuss the record together, with time for questions. Confirm safety-critical details and the reason for unusual arrangements. Keep monitoring or other continuing duties covered during the exchange.
- Reconcile the information before the authorized transfer. Identify who takes each continuing responsibility and when. The turnover record does not replace permit, energy-control or other task-specific transfer and release procedures.

Verify It in the Field

Using the actual record, ask the incoming person to identify the next permitted step and one restriction. Compare the answer with the outgoing person's account and the controlled instruction. Keep any disagreement visible until the responsible role resolves it.

From authorized safe access, compare a selected recorded condition with the field evidence and required inspection results. Use the proper technical role for specialized checks. Do not remove protection or change equipment merely to demonstrate its status during turnover.

Confirm who now owns an unfinished action, continuing control and required contact. Record actual acceptance, transfer time, unresolved restrictions and recheck needs. Check that affected workers received changed information; a signed log alone does not establish shared understanding.

Stop and reassess

Hold continuation or the affected transfer for contradictory status, an unprepared receiver, a missing required check or an uncovered continuing duty. Maintain the defined protection and escalate. Do not leave a critical responsibility unassigned because the shift has ended.

Ask the crew

1. What is unfinished that could look complete to the next crew?
2. Which restriction and continuing duty must transfer explicitly?
3. What evidence will the incoming person check before proceeding?

Use the task plan and required specialist decisions before exposure.

Sources: DOE-HDBK-1028-2009 Vol. 2, pp. 52–53; HSE Shift Handover. Full references and scope: webpage..

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

Expanded guidance and separate forms: toddjeromejenkins.com/toolbox-talks/work-turnover-shift-handoff

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