

Vendor Interfaces: Verify the Handoff and the Evidence

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Why this matters

A vendor may know its equipment well and still be unfamiliar with this site's hazards or release process. The site team may understand local conditions but miss a product limitation. A useful handoff brings both kinds of knowledge together before anyone relies on the work.

Objective: Confirm one vendor interface, its shared control and the evidence required before acceptance or use.

Key hazards or failure points

Unclear scope; incompatible site and vendor instructions; unbriefed personnel; missing product records; changed equipment; two parties assuming the other verified a control; completion mistaken for readiness.

Practical controls

- Before work, compare the contracted task with actual location, equipment and nearby activities. Exchange site and vendor hazards, required competence, emergency arrangements and applicable instructions. Name who resolves conflicts and approves changes.
- Assign each important interface: who establishes, checks, maintains and releases the control. Keep employer, technical and permit responsibilities under their applicable processes. Vendor experience does not remove local orientation or required verification.
- Agree the deliverables and acceptance evidence before the handoff. Identify inspection or test records, equipment identity, restrictions and open items needed for the actual scope. Do not accept an assurance as a substitute for a required record or check.

Verify It in the Field

Ask site and vendor representatives separately to describe one shared control and its owner. Compare their answers at a safe observation point or on the current plan. Resolve gaps before work; record the agreement and responsible contacts.

Trace one consequential vendor statement to applicable evidence. Match the product or equipment identifier, revision, conditions and required acceptance source. Have the designated competent or qualified person perform any necessary technical check through the approved method.

Before handover, compare the delivered status with the acceptance requirements. Confirm open issues, authorized restrictions and the receiving person's understanding. Record actual findings, checker and time; sign only for the scope your role permits and confirm affected crews receive changes.

Stop and reassess

Hold affected work or reliance for conflicting instructions, unidentified responsibility, missing evidence or a change outside the agreed scope. Make the task safe through its procedure and contact the designated authorities. Do not solve a contract or technical dispute by improvising the work. Recheck before authorized release.

Ask the crew

1. What local condition could the vendor miss?
2. Who owns this control through release?
3. What evidence supports accepting this deliverable?

Use the task plan and required specialist decisions before exposure.

Sources: DOE-HDBK-1028-2009, Vol.2, pp.68,69; OSHA recommended practices.

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

Expanded guidance and separate forms: toddjeromejenkins.com/toolbox-talks/vendor-interfaces-handoff-evidence

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