

Unfamiliar Work: Prepare the Question for the Right Expert

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Why this matters

Getting help requires the right person and a clear question. For unfamiliar work, explain what is known, what remains uncertain and which action must wait. Experience on another system may not answer this question.

Objective: Prepare a useful technical consultation and confirm that its answer applies to the actual work before relying on it.

Key hazards or failure points

Asking a vague question; advice based on the wrong configuration; experience mistaken for authorization; unsupported assumptions; remote help without enough information; trial-and-error action before the review.

Practical controls

- State the unresolved question and affected step. Separate observations from assumptions. Identify the equipment, configuration, current instruction and information already available without gathering evidence through unsafe access or operation.
- Use the site's route to the person qualified and authorized for this question. Confirm the scope of their expertise and who can approve the resulting work method. Maintain the task's required protection while awaiting help.
- Have the answer identify its basis, limits and any further information needed. Route changes through the applicable approval process. Brief affected workers on the approved method, control checks and remaining restrictions.

Verify It in the Field

Before contacting help, ask a crew member to summarize the question from the prepared notes. Check that the item identity, observed condition and unknown fact are clear. Record missing information and its safe collection owner; do not fill a gap with a guess.

Confirm the assigned specialist has received the relevant current documents and understands the actual question. Record their role, scope and response status. A forwarded message or appointment does not establish that the issue has been assessed.

When guidance arrives, compare its stated assumptions with the actual work. Have designated people complete the prescribed safe control checks against the governing criteria. Record actual findings, checker and time, then obtain required authorization; advice alone does not release the task.

Stop and reassess

Keep affected work held when the right expertise is unavailable, the question remains unresolved or the answer depends on unverified facts. Escalate through the site process. Do not experiment, bypass protection or treat a general example as approval for the actual equipment.

Ask the crew

1. What exact question needs expertise beyond this crew?
2. Who can answer it and who authorizes the method?
3. Which assumption in the answer needs field evidence?

Use the task plan and required specialist decisions before exposure.

Sources: DOE-HDBK-1028-2009 Vol. 1, pp. 2-25–2-27; OSHA Hazard Prevention and Education/Training.

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

Expanded guidance and separate forms: toddjeromejenkins.com/toolbox-talks/unfamiliar-work-expert-consultation

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