

## **Check it out! The happy-list state**

by Elizabeth Koncki, Maryland

Director Julie Quinn, Minnesota Department of Commerce, has reported on the topic of checklists for “Using Inspection Checklists to Improve Hoist Safety” in 2010.

This article will take this idea of checklists from a single use to a common use tool for any inspection task to improve work and reduce missteps, thereby facilitating a safer work environment. As safety starts first before any task, the focus of this article will be on lists to help before a job is started and slanted to help make the job safe for the worker.

Safety gurus are coming around to an idea that a pre-start checklist can accomplish a lot of good – good habits, good safety, good health. Safety caretakers should always make sure their programs have a complete safety program with all the parts such as JSA, Right to Know, training and audit. But an effective way to get people thinking about safety is to insert it into the everyday task. One way is to create a checklist, which can be based on the job safety analysis (JSA) or exam procedure outline (EPO). Then the checklist can be used further as a quick guide to frame other means of adding safety to the job, like refresher training, tailgate talks, poster and one sheet handouts. A complaint I have heard about JSAs are that so much info is presented that to refer to it at each step could take more time than allowed for the job. To lessen the pressure, consider a checklist as a tool to facilitate getting that JSA knowledge to the forefront of the employee’s thoughts as he/she is about to start a job.

The pre-start checklist is the tool you use when you are about to do a process. I am not saying to shorten the EPO, skip steps or don’t train. I mean at the beginning of a task, say a device inspection, the first step is; get your checklist. Should you use checklists? An example everyone knows of is the aviation pilot running through his required pre-flight checklist. It is a proven method. If it works very well for trained professional competent people in a well-organized industry, how can I say that I will have no benefit from a checklist? I think it is worth consideration.

### **What checklist?**

Everyone knows a list such as milk, bread, eggs. A check list to start a job is a bit more. To be helpful, try stating the items you carry, items you use, items you wear, items to look for in that one job situation. It should state the basic word or phrase (not a long explanation – that comes during the training or on the JSA.) It may be a literal checklist, a mnemonic phrase, a pictogram, or a part of the official report form. With modern phones and tablets, the checklist can be paper or digital. A list should be if needed. It may be created by the employee or the employer in conjunction or apart. Formal acknowledgement of the list would be best as then the list has some flesh, not just an idea.

### **Check it off**

Now, let’s look at some examples of safety checklists. First, a list created from NIST HB 112 EPO 1. (Note that I am pulling from another professional’s work. Thank you, NIST OWM.) I made this list by reading and extracting the heavily outlined safety blurbs written into the EPO. Is it complete? Maybe

not. The EPO itself does caution that each inspection and safety program may have more specific safety concerns. Does it help you bring the safety considerations of testing a small scale into your mind? Let's see.

### NIST HB 112 EPO 1 – Retail Computing Scales

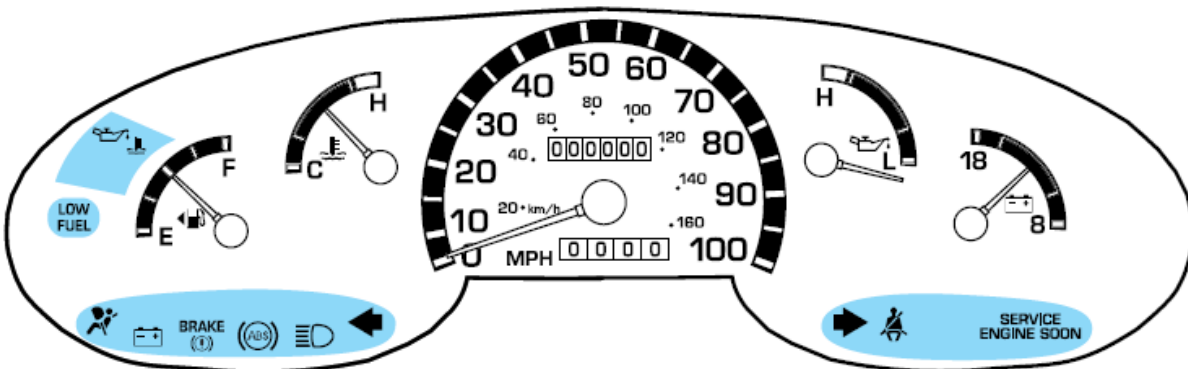
- Site safety hazards - LOOK/ASK
  - Electrical
  - Wet/slick
  - Obstruction
- Hazardous products at/near site - LOOK/ASK
- Support for scale and weight kit - LOOK
- PPE
  - Safety Shoes - Wear
  - Gloves (optional) - Wear
- First Aid Kit - Know
- Proper Lifting - Know

Tip: Know where your exits and emergency equipment (fire/health) are. Eyes UP.

### Vehicle Safety Pre-Drive Check List

This is a vehicle safety Pre-flight or pre-drive checklist. It is entirely visual. The idea is this visual check is a “do it” reminder after the employee has been trained in vehicle operation. Each person goes through the checklist visually and puts a finger on each highlighted item as they check it. Here it is written out and as a picture:

SEATBELTS	IGNITION	WIPERS	NO WARNING LIGHTS
MIRRORS	LIGHTS	HORN	SERVICE INTERVAL NOT DUE
BRAKES	TURN SIGNALS	FUEL/ FLUIDS	MILEAGE LOG



## RMFD INSPECTION PRE-CHECK

Many of Maryland's inspectors have a sealing kit, or work kit. They have a whole toolbox but have over time come to learn that they don't need all the tools to do a specific type of inspection. Example: Retail motor fuel device. The tool kit is one pair wire snips, clip seals and wire, repair/condemn tags, scraper, hole punch, approval seals, flashlight, pump keys, pen. This is in a small box. Why not put a list in the box, with these items on it? Also, the safety pre-start information for gas pump inspection is a simple list and goes on the box. It could look just like the EPO1 list, but it does not as it has been further extracted for the purpose intended, which is to be pasted onto a tool box or a clipboard.

### RMFD

### **\*Report any defective, worn equipment\***

- 1) State ID
- 2) PPE: gloves, coveralls, reflective vest, goggles. (NO poly/rayon clothing) Remove loose jewelry.
- 3) Ground yourself
- 4) Ground correct on the funnel/test unit
- 5) Cones: place between you and traffic
- 6) Hand tools/ equipment/ keys

State ID is on the safety pre-check list as it is a security concern. Being out in the public, it is the only official item which identifies an employee in my program as a worker for the state and it is presented when challenged. This keeps the employee out of misunderstandings and enforces their authority. You may even go so far as to say that if the ID is missing, then no work can be performed.

### Checklist facilitation

If you are looking at your companies JSA for a job you do, or if you are at the step where you don't know where to start for a JSA (there are many online resources to help – see the NCWM Safety Program Toolbox at <http://www.ncwm.net/resource/safety>), then start with just a check list for that job. It is a good way to get the information on paper.

Another link in the Toolbox is the OSHA Hazard Awareness Training Tool game. The module on basic game of Visual Inspection is quite the engaging thing to start thinking about thinking about hazard awareness to then leap to hazard mitigation and then onto my platform for making a pre-start check list.

Also, try gathering knowledge from employees who do the job and have them share with one another. Currently several staff at my program are in training. As we work, I have asked trainers and trainees to add notes to their EPO so they understand the steps in language that makes sense to them. At the next training class, the plan is to have everyone then share and we will make a checklist together. We might even end up with a checklist and a new EPO!

### Checklist in other applications

Checklists are not a bad tool for making good habits. Possibly a checklist can remove conflict from co-workers and the job. (The scenario of hearing about he said, she said stories and the that's-not-my-job syndrome.) With a checklist, just point to it for training or enforcement of proper job methods.

It can be part of your program for quality too when used as the check step in Plan-Do-Check-Act (PDCA aka the Deming Cycle).

### **Check Your Actions**

Be mindful of what you wish to accomplish when using a pre-start checklist. Like any tool, it will only help if understand it and use it properly. Let me give an example where a checklist worked and where it has fallen short.

I have several trainer/trainee pairs working in the field. The trainer is very used to working solo and the trainee is very used to some previous kind of work. So when one of them set up the test measure trailer level and the other one grounds it, they are working together. But in this case no one got out the ground wire and it ended up causing friction in both parties. The trainer knows what to do but forgets to say because is second nature and the trainee has no knowledge that he was supposed to do something. The list in this case was in the back of the EPO and so it was not reviewed before the job started.

At another time, you should have heard the yelp of surprise I let out as I was so startled when one of the trainees was driving into a parking lot and the trainee's hand came off the wheel to release the seatbelt before turning into the parking lot. I learned something that day. The clear the belt move is done in order to be "ready to act" as taught to the trainee in a previous career life. This may be fine for that career, not for the Weights & Measures career. Also, the checklist for pre-drive safety says "seatbelt". The seatbelt was worn (yea checklist!), but it does not say when to take it off. An oversight? An assumption? Poor training? Seemingly so.

As Mr. Brett Gurney highlighted in his safety article in the *NCWM-NEWS* 2015 issue 2, "injuries can be prevented if the hazards are identified and controlled ahead of time." I would challenge you to form the good habit of prevention by keeping your safety on your mind and a checklist in front of you.