

Chapter 2: [Work Planning and Control](#)

## Pre-job Briefing Procedure

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URL: <https://www-esh.slac.stanford.edu/eshmanual/references/wpcProcedPJB.pdf>

### 1 Purpose

The purpose of this procedure is to enhance safety, ensure operational readiness, and improve hazard awareness before work begins, particularly for high-risk, infrequently performed, or complex tasks.

It covers determining the need for and conducting pre-job briefings (PJBs).

It applies to workers (as *workers*, *persons-in-charge*, and *responsible individuals*), including SLAC employees, subcontractors, and users), and supervisors.

The PJB is an integral part of SLAC's Integrated Safety and Environmental Management System (ISEMS) and work planning and control (WPC) processes, which align with Department of Energy (DOE) and Cal/OSHA requirements and best practices to minimize risks associated with hazardous operations.

### 2 Procedures

A *pre-job briefing (PJB)* can take several forms, depending on the complexity and hazards of the activity to be performed.

Examples include

- A *self-readiness check* for individual workers working alone, performing routine tasks  
Before beginning a task, a worker will concentrate on what they are about to do and what they expect to see in response, followed by each subsequent step in the process. If they are uncertain of a step and/or response, they should speak to a co-worker or supervisor for clarification before proceeding. When self-checking, workers often use the *stop, think, act, and review (STAR)* method.
- A discussion between the *person-in-charge (PIC)* and the workers or support personnel
- A formal, documented briefing between the RI or PIC and the workers or support personnel that is part of the *work control document (WCD)* for initial, complex, or hazardous work

The requirement to conduct a pre-job briefing, and the form of the briefing, depends on the risk level of the work, as described below. The requirements differ for individuals working alone, and for high-risk or *infrequently performed tasks*.

## 2.1 Pre-job Briefing Requirements

Type of Work	Required?	Documented?
Red work	Yes	Yes
High-consequence work	Yes	Yes
Resuming work after a stop work	Yes	Yes
Yellow and moderate-risk work <ul style="list-style-type: none"> <li>▪ A pre-experimental briefing performed at one of the user-based experimental departments (covers the scope and activities for the entire experiment)</li> <li>▪ Infrequently performed or first-time tasks (maintenance on a new system, installation of new sensitive/critical equipment or systems)</li> <li>▪ Any task with <i>significant changes</i> to procedures or deviations from standard operating conditions (unusual equipment failures, system modifications, configuration issues)</li> <li>▪ Any task where conditions have changed since the last job briefing (new personnel, altered scope, environmental conditions, resumption after an extended pause)</li> <li>▪ Work near exposed hazardous energy sources (for example, high-energy electrical, cryogenics, high pressure)</li> </ul>	Yes	At the discretion of the RI/PIC
Routine moderate-risk work	Yes (minimum weekly)	Not required
Low-risk work	At the discretion of the RI/PIC	Not required
Green work	Not required	Not required

### 2.1.1 Individuals Working Alone

Type of Work	Required	Documented
Low-risk or routine work A worker working alone does not need to conduct a briefing. However, the supervisor must ensure that the tasks to be performed are planned as if a briefing were required.	Self-readiness check	Not required

### 2.1.2 High-risk, First-time, and Infrequently Performed Activities

For high-risk work or work being performed by the first time by the workers, the following additional requirements apply:

- More detailed hazard analysis with input from ESH program managers and other subject matter experts
- A dry run or simulation if the task is highly complex or never performed before
- A readiness review by a supervisor or safety officer before work begins

- Increased frequency of check-ins and monitoring throughout the task

For *infrequently performed tasks*, defined as work performed previously but not within the past six months or longer by members of the work team, a job location walkthrough must be conducted before the pre-job briefing to identify any changed conditions or unexpected risks.

### 2.1.3 Timing and Frequency

Pre-job briefings must be conducted before work begins, and as frequently as necessary when

- Beginning of each job or task
- Start/end of the week
- New worker added to a task, or assignments have changed
- Changing conditions are encountered
- Significant delays, work interruption, or extended period of inactivity
- Shift change, extended hours
- Change in scope of work
- Unexpected complications, hazards, or distractions
- After a pause/stop work

If the work or operations to be performed during the workday or shift are repetitive and similar, at least one job briefing must be conducted before the start of the first job of each day or shift.

## 2.2 Pre-job Briefing Procedure

Step	Person	Action
<b>Preparation</b>		
1.	PIC	Gathers all relevant job documents to familiarize themselves with various aspects of the activity before conducting the PJB For example: <ul style="list-style-type: none"> <li>▪ Work orders and procedures (SOP, checklists, ELP)</li> <li>▪ Job safety analysis (JSA) and/or activity training authorization (ATA)</li> <li>▪ Permits/forms (EWP, radiation work, confined space entry, hot work)</li> </ul> Identifies the need for work to be done
<b>Conduct the Briefing</b>		
2.	RI/PIC	Conducts an interactive pre-job briefing in a work environment that fosters attention and participation Facilitates the briefing using the <a href="#">PJB Sheet</a>
3.	Work group (RI/PIC, workers, and support personnel)	Participates in the briefing using all the necessary documentation, to review and confirm the work group's readiness to perform the activity Discussion topics must include the following:

Step	Person	Action
		<ul style="list-style-type: none"> <li>▪ Job scope: tasks to be performed, expected duration</li> <li>▪ Roles and responsibilities: who is responsible for each aspect of the job</li> <li>▪ Hazards and mitigations: review hazard table, safety controls, and PPE</li> <li>▪ Emergency procedures: location of exits, fire extinguishers, first aid kits, emergency response contacts, location of gathering points</li> <li>▪ Stop work expectations: clarify that any worker can stop work if unsafe conditions arise</li> <li>▪ <i>Error-likely situations (common error precursors)</i>: schedule pressure, irreversible point of action, distractions, multi-tasking, unexpected equipment response, etc. (See <a href="#">DOE-HDBK-1028</a>, Volume 1, Page 2-32)</li> <li>▪ Error reduction tools: reinforce techniques like STAR (stop, think, act, review), peer checking, and three-way communication</li> </ul>
<b>Documentation and Worker Acknowledgment</b> (if documented PJB is required)		
4.	Work group (RI/PIC, workers and support personnel)	Must sign the pre-job briefing sheet before beginning work
5.	RI/PIC	Must verify understanding by asking workers to summarize key points Retains completed pre-job briefing sheet in job file
<b>Work Execution and Ongoing Hazard Monitoring</b>		
6.	RI/PIC	If conditions change significantly mid-task, conducts a follow-up briefing Ensures continuous adherence to the safety measures discussed If a deviation from the job scope occurs, stops work (see
<b>Post-job Review</b> (required for high-risk or infrequently performed work)		
7.	Work group (RI/PIC, workers and support personnel)	Discuss: <ul style="list-style-type: none"> <li>▪ What went well?</li> <li>▪ What could be improved?</li> <li>▪ Were there any near misses or incidents?</li> </ul> Lessons learned must be documented and shared within the work group.

### 3 Forms

The following forms and systems are required by this procedure:

- [Pre-job Briefing Form](#) (SmartSheet; a [PDF](#) version is also available). Form and tool for documenting pre-job briefings

### 4 Recordkeeping

The following recordkeeping requirements apply for this procedure:

- Pre-job briefing sheets must be maintained for at least 12 months.
- Post-job reviews should be archived for trending and lessons learned.

## 5 References

[SLAC Environment, Safety, and Health Manual](#) (SLAC-I-720-0A29Z-001)

- [Chapter 1, “General Policy and Responsibilities”](#)
  - [General Policy and Responsibilities: Hazard Control Selection and Management Requirements](#) (SLAC-I-720-0A24S-001)
- [Chapter 2, “Work Planning and Control”](#)
  - [Work Planning and Control: Authorization and Release Summary](#) (SLAC-I-720-0A21S-006)
  - [Work Planning and Control: Work Planning and Control Procedure](#) (SLAC-I-720-0A21C-002)
  - [Work Planning and Control: Construction Work Planning and Control Procedure](#) (SLAC-I-720-0A21C-005)
  - [Work Planning and Control: Enhanced Rigor Work Planning and Control Procedure](#) (SLAC-I-720-0A21C-006)
  - [Work Planning and Control: Stop Work Procedure](#) (SLAC-I-720-0A21C-003)
  - [Work Planning and Control](#) (includes online tools)

Other SLAC Documents

- None

Other Documents

- Department of Energy Handbook 1028, “Human Performance Improvement Handbook” ([DOE-HDBK-1028](#))
- Department of Energy Handbook 1113, “Radiological Safety Training for Accelerator Facilities” ([DOE-HDBK-1113](#))
- Department of Energy Handbook 1211, “Activity-Level WPC Implementation” ([DOE-HDBK-1211](#))

## 6 Definitions

*activity-level work (ALW)*. Any job, task, or sub-task performed where hazards are present, are introduced by the work, such as research and development (R&D), *deactivation and decommissioning (D&D)*, construction, operations, and maintenance; or are introduced by the work environment (regardless of who is performing the work or the organization with which they are affiliated). The hazards involved could be potentially adverse to worker health and safety, the public, the environment, or safeguards or security. ([DOE-HDBK-1211](#))

*coordination meeting*. Meeting that an area manager has in the field at the beginning of a *planned access for machine maintenance (PAMM)* to give an overview of work planned for the day and inform workers of other work in the area

*hazard.* Potential for harm to people, equipment, or environment

*high-consequence work.* Tasks or activities where errors or incidents during the work have the highest potential adverse consequence to SLAC personnel, property, or programs. Work would be considered high consequence if there is the potential for any of the following conditions:

- Any work that has risk of serious injury or fatality that is not fully eliminated through normal WPC
- Could result in release to the environment of radionuclides or other hazardous substances that could result in on- or off-site personnel exposure above permissible limits or exceed local, state, or federal reportable quantities
- Cost to replace or repair the item or system or delay in operations would have a negative impact on facility, organizational, or DOE budgets to the extent that it would affect program commitments
- Item or system being worked on is unique and if damaged would be irreplaceable or not repairable and is vital to a system, facility or project operation
- *Deactivation and decommissioning (D&D)* activities of legacy systems or infrastructure

*infrequently performed task.* Work performed previously but not within the past six months or longer by members of the work team

*pause work.* Halting an activity due to *non-imminent danger*. A request by any worker for a pause in the work activity, including clarification or resolution on a potential problem, concern, or issue. Work may be resumed with supervisor approval. (See *stop work* for *imminent danger*.)

*planned access for machine maintenance (PAMM).* A maintenance period that requires access to accelerator housing. Electrical power, radiofrequency (RF), and other accelerator housing hazards may be turned off to accommodate work.

*pre-job briefing (PJB).* A briefing with formalization and details consistent with the complexity and hazards of the activity to be performed

Examples include

- A *self-readiness check* for individual workers working alone performing routine tasks
- A discussion between the supervisor or *person-in-charge (PIC)* and the workers or support personnel
- A formal, documented briefing between the supervisor or PIC and the workers or support personnel that is part of the *work control document (WCD)* for initial, complex, or hazardous work

*PJB, formal.* Meeting before starting work where the work plan is discussed with people performing the work, including a discussion of elements listed on the PJB checklist

*PJB, documented.* PJB for which the details are recorded

*risk.* The combination of the probability of an event and the consequence from that event that determines the potential impact of the event. Risk is determined from analysis of the probability and consequence using some rigorous and defined hazard analysis process.

<b>Probability</b>				
<b>Consequence</b>	Extremely Low	Low	Medium	High

Extremely low				
Low				
Medium				
High				
<b>Risk Level</b>				
	High	Unacceptable		
	Medium	Unacceptable		
	Low	Acceptable		
	Extremely low	Acceptable		

From [General Policy and Responsibilities: Hazard Control Selection and Management Requirements](#)

*low-risk work.* Routine tasks that present minimal safety, health, or environmental hazards, and can be performed with basic training and standard precautions. These tasks do not involve hazardous energy, materials, or elevated work and pose little to no risk of injury when standard procedures are followed.

*routine moderate-risk work.* Tasks that are performed regularly and are well understood, but still involve hazards that could cause injury, equipment damage, or environmental impact if not properly controlled.

This type of work typically

- Does not involve highly hazardous materials or energies, for example, pyrophorics, large cryogen volumes, radiation
- Is not classified as high-risk or critical
- Has established procedures, for example, ELPs, SOPs, standing JSAs, or similar
- Requires PPE and basic controls, but not necessarily full engineering isolation or extensive planning

Examples:

- Connecting or disconnecting gas cylinders (non-toxic, non-flammable)
- Performing mechanical adjustments on vacuum chambers or beamline components
- Replacing sensors or instrumentation in an energized system with LOTO in place
- Minor cryogenic transfers using small dewars (<100 L), with proper PPE and ventilation
- Use of hand tools or power tools in a controlled environment

*self-readiness check.* Typically used by those working alone. Before beginning a task, a worker will concentrate on what they are about to do and what they expect to see in response followed by each subsequent step in the process. If they are uncertain of a step and/or response, they can speak to a co-worker or supervisor for clarification before proceeding. When self-checking, employees often use the acronym STAR, which stands for stop, think, act, and review.

*significant change.* Change that must be communicated to the work team to ensure a successful task outcome, or any change that requires review and approval by the supervisor and/or authority having jurisdiction

*stop work.* A definitive statement made openly that an *imminent danger* is present and all related activities must stop immediately or that an assigned task poses risk of death or serious injury and will not be performed (See *pause work* for *non-imminent danger*.)

*tailgate briefing.* Review by workers and their supervisor of an activity immediately before release to ensure worker understanding of the interdependent hazards and controls, hold points, unique area hazards, and agreement on how to execute the work. Work planning meetings where multiple work groups' or departments' work activities are coordinated and released.

*task.* A step (that is, action) or series of steps designed to contribute to a specified end result for an activity. It has an identifiable beginning and end that is a measurable component of the duties and responsibilities of a specific activity (for example, INITIATE cooling water system operation)

*work control document (WCD).* A document that records, at a minimum, the scope of an activity, the location, a list of activities/tasks, hazards, and controls associated with the activity. This is the work document that is used in the field to implement activity-level work. Examples include technical procedures, test plans, work instructions. Examples include *job safety analyses (JSAs)*, *standard operating procedures (SOPs)*, *activity and training authorizations (ATAs)*, permits, forms, checklists, drawings.