



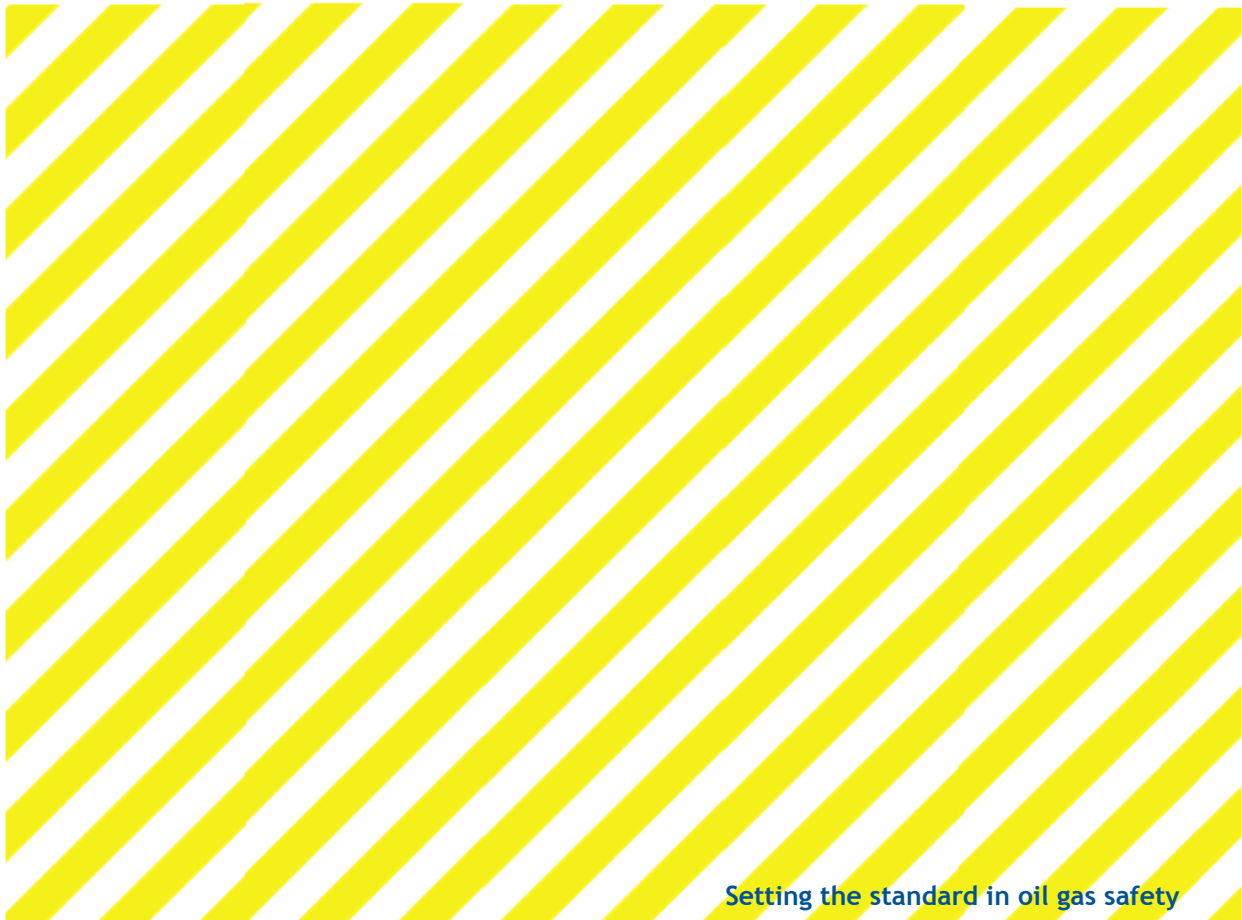
SITE SPECIFIC ORIENTATION

A Program Development Guideline

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- Explorers and Producers Association of Canada (EPAC)
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ABOUT ENERGY SAFETY CANADA

Energy Safety Canada is the upstream oil and gas industry's advocate and leading resource for the continuous improvement of safety performance. Our mission is to help companies achieve their safety goals by providing practices, assessment, training, support, metrics and communication.

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DISCLAIMER

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1.0 Introduction

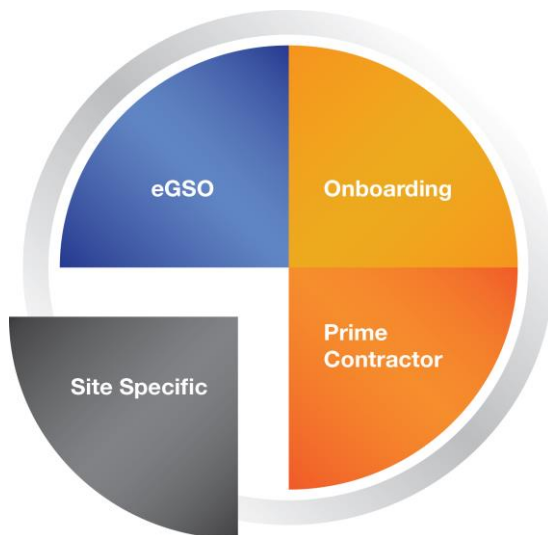
All employers, regardless of jurisdiction, are required to conduct and participate in **site specific orientations**.

Site specific orientations cover the specific hazards, conditions, equipment, procedures, rules, and regulations where the work occurs.

This includes, but is not limited to, well sites, plant sites, pipeline construction sites, seismic and other exploration operations and other active oil and gas worksites.

Workers go through several kinds of orientations before they perform any work. Some of these orientations are outlined in a high-level overview in the adjacent table.

This document is focused on site specific orientations



eGSO:

eGSO is an online safety orientation program and is the standard general safety orientation for all workers in the petroleum industry. There is a focus on:

- Legislation
- Hazards
- Controls

Taken once and has no expiry date.

Onboarding:

Onboarding is the process where new employees acquire the necessary knowledge, skills, and behaviors to become effective organizational employees. Some topics include:

- HR indoctrination requirements - payroll, policies, benefits, job roles and responsibilities
- HSE indoctrination - management system, policies, standards, practices, procedures with roles and responsibilities, expectations
- Company HSE mission, vision, goals, values, campaigns

Prime Contractor:

Prime contractor messaging is the information that is delivered to all workers on a prime contractor's site. Some of these topics include:

- Mission
- Vision
- Goals and values
- Campaigns
- Expectations

Site Specific:

Site specific orientations cover the **specific hazards**, conditions, equipment, procedures, rules and regulations where the work occurs. **More information is outlined in this document.**

2.0 Purpose

The purpose of this document is to maximize the effectiveness of site specific orientations by bringing alignment to industry procedures.

This document will provide both oil and gas companies and contracting companies with guidance on what they need to cover in their site-specific orientations. Effective site-specific orientations will help prevent injury and illness to workers in the upstream oil and gas industry.

In addition, Appendix A is a blank fillable template for organizations to use.

3.0 Roles and Responsibilities

This document is not designed to interpret Canadian provincial Occupational Health & Safety laws. It is intended for general use and may not apply to every circumstance. For more information please see the Energy Safety Canada's General Safety Orientation Guideline.

When Working in British Columbia: The British Columbia Occupational Health and Safety Regulation, Section 3.23 requires employers to provide young and new workers with a safety orientation. In BC any worker under the age of 25 is considered young. Section 3.23 outlines the specific information that an occupational health and safety orientation must address.

When Working in Saskatchewan: The Saskatchewan Occupational Health and Safety Act, 1993, and the Occupational Health and Safety Regulations, 1996, require the employer to provide all new, inexperienced and transferred workers with a basic health and safety orientation. Orientation requirements are set out under Section 19 of the regulations (Training of Workers). Orientation must include training a worker on all matters that are necessary to ensure the health and safety of the worker at work, and must also include providing the worker with information on the specific matters set out in sub-section 19(2) of the Saskatchewan regulations.

When Working in Alberta: The Alberta Occupational Health and Safety Act, Section 2(1), and OHS Regulation, Sections 12, 13, and 15 require all employers to do everything reasonably practicable to ensure the health and safety of workers under their employment or direction. They must conduct a written hazard assessment, implement controls and ensure that workers are aware of their responsibilities and duties under the OHS Act. Employers must ensure that all equipment used at a work site is properly maintained and safe for use and that workers completing work are either competent to do so, or under the direct supervision of a worker who is competent. Every employer must ensure that workers are adequately trained in the safe operation of equipment, including safety protective equipment, and that they are adequately trained in the use of safe operating procedures, including any procedures designed to minimize the worker's exposure to a harmful substance.

Note: For further responsibilities, refer to applicable legislation for the jurisdiction where the work is being carried out.



The following discusses the general responsibilities of the Prime Contractors, Supervisors and Workers.

3.1 Prime Contractor

The client or owner is the prime contractor unless the responsibility is assigned, in writing, to another qualified party. Once identified, the name of the prime contractor must be posted in a conspicuous place at the work site. Prime Contractors are to be provided the names of the supervisors responsible for the workers at the work site.

It is the responsibility of the prime contractor to coordinate, organize and oversee the performance at the work site to ensure, as far as it is reasonably practicable to do so, that no person is exposed to hazards arising out of, or in connection with, the work site. They are moreover required to ensure their own activities do not create a hazard to the health and safety of others and may be required to establish a written code of practice.

Prime contractors are responsible for equipment, infrastructure and excavations that are designed, constructed, erected, or installed by or on behalf of the prime contractor and may include toilet facilities, scaffolds, guardrails, waste disposal, propane tanks for site heating, entry and exit ramps and fall protection anchorages.

Responsibilities of a prime contractor include the establishment of a joint work site health and safety committee if the work site has 20 or more workers and the work is expected to last 90 days or more. Prime contractors are required to cooperate with the joint work site health and safety committee in the effort to resolve health and safety issues.

The prime contractor is required to report injuries and incidents to OHS, conduct an investigation and report findings.

As the prime contractor is charged with the overall responsibility for the health and safety of all workers at the worksite, the prime contractor must ensure contractors and employers comply with the applicable Occupational Health and Safety Act and Regulations.

3.2 Supervisor

Supervisors share the responsibility of complying with legislation in conjunction with any others who may direct workers.

The Role of the Supervisor: The OHS legislation in BC, Alberta and Saskatchewan all contain a specific section on Oil and Gas. In those sections, the supervisor is specifically identified as responsible to ensure a healthy and safe work place. The supervisor can also be held criminally liable in the event of a serious incident under Section 217 of the Criminal Code of Canada which states: “217.1 Everyone who undertakes, or has the authority, to direct how another person does work or performs a task is under a legal duty to take reasonable steps to prevent bodily harm to that person, or any other person, arising from that work or task.”

Alberta legislation mandates that ***“supervisors must be competent, protect the health and safety of workers, advise workers of all health and safety hazards, report all health and safety concerns to the employer, and prevent violence and harassment”***¹. It moreover requires supervisors to ***“report to the employer a concern about an unsafe or harmful work site act that occurs or has occurred or an unsafe or harmful work site condition that exists or has existed”***²

3.3 Worker

Workers are responsible for:

- Assisting their employers in the identification of hazards and implementation of hazard controls
- Following safe work procedures
- Performing their work to the level to which they have been trained and certified
- wear all personal protective equipment designated, as required by the nature of the work refrain from causing or participating in harassment or violence

Each worker must know their health and safety rights:

- Right to Refuse (to perform unsafe work)
- Right to Know
- Right to Participate

¹ Occupational Health & Safety Legislation: www.alberta.ca/ohs-hanges.aspx

² *Alberta Bill 30: An Act to Protect the Health and Well-being of Working Albertans*, Sec.4, (c).

4.0 Who Should Deliver a Site-Specific Orientation?

The site-specific orientation should be delivered by either the one responsible for the worksite or a competent delegate. On large sites there may be a requirement for multiple people to deliver a site-specific orientation not just one supervisor.

This applies for all companies whether there is a site representative present or not.

When Should a Site-Specific Orientation be Delivered?

There are many situations when a site-specific orientation should be delivered. The below list highlights a few of those circumstances:

- First time on location or wellsite
- When things change: this includes change of projects, changes in the scope of work, concurrent work, conditions, etc.
- When workers return from an absence
- When visitors arrive on site

5.0 Site-Specific Orientation General Topics

The list below describes general topics that may be included in a site specific orientation (as referenced in Energy Safety Canada's General Safety Orientation Guideline). Not all these elements will apply to all sites. Only use those that are directly relevant for the site or sites where the orientations will take place.

- Emergency procedures
- First Aid facilities
- Prohibited or restricted areas
- Associated safety rules
- Housekeeping requirements
- General WHMIS information
- SDSs and how to access them
- Reporting incidents and near misses
- Personal Protective Equipment (PPE)
- Emergency showers, etc.
- Smoking restrictions
- How to do the job safely
- Specific regulations
- General site hazards
- Hazard reporting
- Washrooms
- Pre-work hazard assessment/permitting required

5.1 Site-Specific Orientation – General Site Conditions

No two sites will ever have the exact same set of conditions. This section outlines some of the conditions to address in a site-specific orientation.

The current weather and changes in the weather are important factors to consider as the weather can have an impact on the hazards that present themselves.

Some things to consider include:

- The potential for occupational exposures (e.g. noise exposure, percentage of hydrogen sulphide, silica dust, etc.)
- Adequate lighting
- High voltage areas, overhead power lines
- Presence of wildlife and the procedure to follow if wildlife is encountered
- Any other condition that may be present that could impact the site

5.2 Site-Specific Hazard Assessment

A site-specific or field level hazard assessment is performed before work starts at a site. It is also conducted where conditions change or when non-routine work is added.

Site-specific hazard assessments check for the introduction of any unexpected hazards, or hazards for which additional controls may be needed. Any hazards identified during a site-specific hazard assessment must be addressed right away, before work begins at the location. If a site-specific hazard assessment recognizes a hazard that was overlooked by the formal assessment, the formal assessment must be updated to include it.

For some suggested topics to include in a hazard assessment, see Appendix B (can be used as a template).



Appendix A: Site-Specific Orientation Template

Note: This document is customizable for your organization’s needs.

Date:	Location		Company/Operator	Company/Operator Rep
Orientation given by:				

Existence of Imminent Danger: No worker shall carry out any work, operate any tool, appliance or equipment if, on reasonable and probable grounds, the worker believes that there exists an imminent danger to the health or safety of that worker or another worker on that job site.

Obligation/Right to Refuse Responsibilities: All workers have the responsibility and right to refuse unsafe work. If a worker encounters an unsafe work environment he/she MUST report it to the supervisor.

Checklist code	Y = Yes	X = No	NA = Not Applicable	
Emergency Response Plan (ERP)	Sign in process			
	Muster point(s)			
	Alarm(s)			
	Emergency contact information and where it is located			
	H2S %/PPM			
	Wind direction identified			
	Air pack placement			
	First aid equipment			
	Eye wash station			
	Fire extinguishers			
	Who is the medic and where they can be found on site			















Checklist code	Y = Yes	X = No	NA = Not Applicable
Personal Protective Equipment (PPE)	Wear appropriate PPE for the task being complete, refer to company's rules and the SDS sheets		
	Hard hat, steel toe boots, safety glasses, coverall/reflective clothing		
	Site specific PPE (e.g. respirators, fall protection, etc.)		
Facilities and Site Information	Washrooms		
	Smoking area		
	Vehicle parking		
	Adequate lighting (indoor activities, outdoor activities, night)		
	Housekeeping (location of garbage dumpsters, etc.)		
Concurrent Activities	Everyone on site only permitted in the areas where they are required to be		
	Communication of new and existing hazards to everyone on site		
Incident Reporting	All workers are responsible to report hazards and near misses		
	Who?		
	How?		
	Job safety analysis, standard operating procedures or hazard assessments will address these hazards		

I acknowledge the above. PLEASE PRINT				
Company Name	Individual/Employee Name	Initial		Date
		In	Out	



Appendix B: Hazards and Controls

This table of Hazards and Controls can assist the work group to manage hazards for the proposed work. The table does not include all possible hazards. It is expected that the required PPE for the activity and work conditions will be used. Determine the Hazards that are present for the task and identify the Controls to be implemented.

<p> Pressurized Equipment</p> <ul style="list-style-type: none"> <input type="checkbox"/> Perform Isolation – LO/TO, blinding, or defeat <input type="checkbox"/> Depressurize, drain, purge, and vent <input type="checkbox"/> Relieve trapped pressure <input type="checkbox"/> Avoid auto-refrigeration when depressurizing <input type="checkbox"/> Anticipate residual pressure or fluids 	<p> Poor Lighting or visibility</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provide alternate lighting <input type="checkbox"/> Wait or defer until visibility improves <input type="checkbox"/> No work over water that could require rescue (including sea state) 	<p> Personnel</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provide Induction or training for new workers <input type="checkbox"/> Mentor, coach, or supervise <input type="checkbox"/> Verify competencies, skills, and experience <input type="checkbox"/> Address applicable limitations (fatigue, exhaustion, and restricted duty) <input type="checkbox"/> Manage multiple languages
<p> Hazardous substance</p> <ul style="list-style-type: none"> <input type="checkbox"/> Drain or purge equipment <input type="checkbox"/> Follow MSDS controls <input type="checkbox"/> Implement health hazards controls (Lead, Asbestos, H₂S, Iron Sulphide, Sulfur Dioxide, NORM) <input type="checkbox"/> Test or analyze material 	<p> Potential Spills</p> <ul style="list-style-type: none"> <input type="checkbox"/> Drain equipment <input type="checkbox"/> Provide spill containment equipment <input type="checkbox"/> Have spill clean up materials and equipment on hand <input type="checkbox"/> Restrain and isolate hoses when not in use 	<p> Equipment Hot or Cold</p> <ul style="list-style-type: none"> <input type="checkbox"/> Heat or cool equipment before work starts <input type="checkbox"/> Install barriers <input type="checkbox"/> Provide warning signs <input type="checkbox"/> Implement cold temperature and brittle failure controls <input type="checkbox"/> Wear thermal gloves
<p> Portable Electrical Equipment</p> <ul style="list-style-type: none"> <input type="checkbox"/> Inspect equipment for condition and test date currency <input type="checkbox"/> Implement continuous or periodic gas testing <input type="checkbox"/> Protect electrical leads from impact or damage 	<p> Radiation Hazard</p> <ul style="list-style-type: none"> <input type="checkbox"/> Use barriers and signs to restrict access <input type="checkbox"/> Notify personnel who may be affected <input type="checkbox"/> Implement NORM controls <input type="checkbox"/> Conduct mRem testing 	<p> Moving Objects or Equipment</p> <ul style="list-style-type: none"> <input type="checkbox"/> Confirm machinery guard integrity <input type="checkbox"/> Provide protective barriers <input type="checkbox"/> Observer to monitor proximity of people and equipment <input type="checkbox"/> Shut down or lockout equipment
<p> High Energy or High Voltage</p> <ul style="list-style-type: none"> <input type="checkbox"/> Restrict access to authorized personnel only <input type="checkbox"/> Discharge equipment and make electrically dead <input type="checkbox"/> Observe safe work distances for live cables <input type="checkbox"/> Use flash burn PPE suit <input type="checkbox"/> Use Insulated gloves, tools, and mats 	<p> Excavations</p> <ul style="list-style-type: none"> <input type="checkbox"/> Have an excavation plan or safe work practice <input type="checkbox"/> Locate underground pipes or cables by hand digging <input type="checkbox"/> De-energize underground services <input type="checkbox"/> Implement confined space entry controls 	<p> Waste Clean Up and Disposal</p> <ul style="list-style-type: none"> <input type="checkbox"/> Apply environmental management practices <input type="checkbox"/> Follow site waste management procedures <input type="checkbox"/> Clean up equipment and materials at site <input type="checkbox"/> Optimize task to minimize waste production

<p> Confined Space</p> <ul style="list-style-type: none"> <input type="checkbox"/> Discuss confined space entry safe work practice <input type="checkbox"/> Monitor access or entry <input type="checkbox"/> Protect surfaces from inadvertent contact <input type="checkbox"/> Do not locate mobile engines near confined space <input type="checkbox"/> Provide observer <input type="checkbox"/> Develop rescue plan 	<p> Simultaneous Operations (SIMOPS)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Follow SIMOPS matrix <input type="checkbox"/> MOC required for deviation from SIMOPS restrictions <input type="checkbox"/> Interface between groups <input type="checkbox"/> Use barriers and signs to segregate activities <input type="checkbox"/> Have permit signed by leader of affected groups 	<p> Weather</p> <ul style="list-style-type: none"> <input type="checkbox"/> Implement controls for slippery surfaces <input type="checkbox"/> High winds – goggles <input type="checkbox"/> Heat – hydration, breaks <input type="checkbox"/> Cold – PPE, heaters <input type="checkbox"/> Lightning – tool selection, defer work 	<p> Ignition Sources</p> <ul style="list-style-type: none"> <input type="checkbox"/> Remove, isolate, or contain combustible materials <input type="checkbox"/> Provide fire fighting equipment <input type="checkbox"/> Construct a fire-safe habitat <input type="checkbox"/> Provide a fire watch during and after hot work <input type="checkbox"/> Conduct continuous or periodic gas testing <input type="checkbox"/> Bond or earth for static electricity or cathodic protection
<p> High Noise</p> <ul style="list-style-type: none"> <input type="checkbox"/> Wear correct hearing PPE <input type="checkbox"/> Manage exposure times <input type="checkbox"/> Shutdown equipment <input type="checkbox"/> Use "quiet" tools <input type="checkbox"/> Sound barriers or curtains <input type="checkbox"/> Provide or use suitable communication techniques 	<p> Falling or Dropped Objects</p> <ul style="list-style-type: none"> <input type="checkbox"/> Use signs and barriers to restrict entry or access under work at elevation <input type="checkbox"/> Use lifting equipment to raise tools to or from the work platform <input type="checkbox"/> Secure tools (tie-off) 	<p> Lifting Equipment</p> <ul style="list-style-type: none"> <input type="checkbox"/> Confirm lifting equipment condition and certification <input type="checkbox"/> Obtain approval for lifts over processing equipment <input type="checkbox"/> Have a documented and approved lift plan 	<p> Work at Heights</p> <ul style="list-style-type: none"> <input type="checkbox"/> Discuss working at heights safe work practice <input type="checkbox"/> Verify fall restraint and arrest equipment certification <input type="checkbox"/> Apply safe work practice
<p> Manual Handling</p> <ul style="list-style-type: none"> <input type="checkbox"/> Assess manual handling task <input type="checkbox"/> Limit load size <input type="checkbox"/> Manage posture <input type="checkbox"/> Confirm stability of load and work platform <input type="checkbox"/> Get assistance or mechanical aid to avoid pinch points 	<p> Equipment and Tools</p> <ul style="list-style-type: none"> <input type="checkbox"/> Inspect equipment and tools <input type="checkbox"/> No use of modified tools <input type="checkbox"/> Use protective guards <input type="checkbox"/> Use correct tools and equipment for task <input type="checkbox"/> Protect or remove sharp edges 	<p> Vibrating Equipment</p> <ul style="list-style-type: none"> <input type="checkbox"/> Manage exposure times <input type="checkbox"/> Assess affect of vibration on equipment <input type="checkbox"/> Use low vibration equipment <input type="checkbox"/> Apply noise controls 	<p> Slips, Trips, and Falls</p> <ul style="list-style-type: none"> <input type="checkbox"/> Identify and shield uneven surface or projections <input type="checkbox"/> Secure or cover cables, cords, and tubing <input type="checkbox"/> Clean up liquids <input type="checkbox"/> Barricade or rope-off openings and holes
<p> Other Energy Sources</p> <ul style="list-style-type: none"> <input type="checkbox"/> Spring compression or expansion control <input type="checkbox"/> Implement electromagnetic (radio) controls <input type="checkbox"/> Manage pressure or vacuum <input type="checkbox"/> Manage heat generating processes <input type="checkbox"/> Use seismic activity safe work practice 	<p> Mobile Equipment</p> <ul style="list-style-type: none"> <input type="checkbox"/> Assess equipment condition <input type="checkbox"/> Implement controls on users or access <input type="checkbox"/> Limit and monitor proximity to live equipment or cables <input type="checkbox"/> Manage overhead hazards <input type="checkbox"/> Adhere to road and site rules 	<p> Other Hazards</p> <ul style="list-style-type: none"> <input type="checkbox"/> Implement abrasive blasting controls (for equipment and practices) <input type="checkbox"/> Prepare a dive plan <input type="checkbox"/> Manage potential blocked or plugged equipment <input type="checkbox"/> MOC required for temporary connections or modifications 	<p> Emergency Response</p> <ul style="list-style-type: none"> <input type="checkbox"/> Keep egress route open <input type="checkbox"/> Keep shower and eye wash stations accessible <input type="checkbox"/> Have a rescue plan in place <input type="checkbox"/> Keep emergency alarm, fire equipment, and shutdown locations unobstructed

Appendix C: Definitions

Accident: An undesired event that results in physical harm to a person or damage to property.

Accountability: An obligation to answer for the results of an action.

Administrative Controls: Controls that alter the way the work is done, including timing of work, policies, and other rules. Administrative controls include work practices such as standards and operating procedures. They encompass all areas of work, such as training, housekeeping, equipment maintenance, and personal hygiene practices.

Contract Worker: An individual that performs work equal to that provided by an employee, but is not on the company's payroll. Contract workers must submit an invoice to the company to get paid. They may or may not maintain their own Workers' Compensation Board (WCB) account.

Contractor: An individual or employer hired under contract to provide materials or services to another individual or employer. The work tends to be of a specific scope or time-frame. A contractor is hired to complete a service for a specific project and must rebid on new projects. They usually maintain their own WCB account.

Contract Operator: An independent contractor that provides onsite services for field management and the operation of wells, pipelines, and facilities. The contract operator performs all work and services as directed by the Prime Contractor.

Employee: All managers, supervisors, and workers who are on the company's payroll.

Employer: means

- (i) a person who is self-employed in an occupation,
- (ii) a person who employs one or more workers,
- (iii) a person designated by an employer as the employer's representative, or
- (iv) a director or officer of a corporation who oversees the occupational health and safety of the workers employed by the corporation;

Engineering Controls: This is the preferred method of hazard control is elimination or substitution is not possible. Engineering controls are physical controls implemented at the design, installation, or engineering stages. Examples include guards and auto shut-off devices.

Frontline Supervisor/Manager: An individual responsible for assigning and monitoring workers' day-to-day activities.

Hazard: A situation, condition, or behavior that has the potential to cause an injury or loss.



Hazard Assessment: A process used to identify and evaluate the health and safety hazards associated with tasks. Hazard assessment provides a method for prioritizing health and safety hazards.

Hazard Control: The method used to eliminate or control loss.

Imminent Danger: A danger that is not normal for that occupation, or a danger under which a person engaged in that occupation would not normally carry out the person's work.

Incident: Any undesired event. Accidents are one type of incident. Near-misses are another.

Near Miss: An undesired event that, under slightly different circumstances, could have results in personal harm, property damage, or loss.

Owner/Operator: An individual who owns and operates his or her own business or equipment for the purpose of earning include. Examples include a backhoe operator, truck driver, and chainsaw operator. An owner/operator has no employees.

Personal Protective Equipment (PPE): Equipment or clothing used for protection from health or safety hazards associated with conditions at a worksite. Although these items create a barrier between the hazard and the person, they do not affect the hazard itself. Examples include gloves, safety glasses, and fall protection equipment. PPE is used when engineering or administrative methods cannot fully control the hazards.

Prime Contractor: Is the contractor, employer or other person who enters into an agreement with the owner of the work site to be the prime contractor, or if no agreement has been made or no agreement is in force, the prime contractor is the owner of the work site.

Risk: A function of the severity of harm and the likelihood of the occurrence of that harm.

Risk Assessment: An objective evaluation of the probable severity and likelihood of as hazard that could result in a potential transfer of energy to a target.

Safety Data Sheets: are a widely used system for cataloging information on chemicals, chemical compounds, and chemical mixtures. SDS information may include instructions for the safe use and potential hazards associated with a particular material or product. The SDS should be available for reference in the area where the chemicals are being stored or in use

Safe Operating Procedures: Written guidelines for procedures and tasks involving recognized hazards.

Substandard Conditions: Conditions that vary from normal and accepted safe conditions and that could cause injury, death, or property damage if not corrected.

Substandard Practices: Personal behavior that varies from accepted or legislated safe practices, and that creates a hazard to the person, other people, or equipment.



Supervisor: A person who is in charge of a workplace or has authority over a worker. They may not have the title of supervisor, although they fulfill the function described.

Task: A work activity that is discrete, observable, and performed in a limited period of time. The task must lead to a product, service, or decision.

Worker: An employee under the supervision of a manager, supervisor, or frontline supervisor.



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