

Task method statement (daily SWMS)

A method statement for ONE task on ONE day: who does the task and who supervises, the steps in order, for each step the hazards and the controls (the most effective control first), the plant and materials, the permits and isolations it relies on, the competence checked, the emergency arrangements, the other trades nearby, the stop-work rule, a briefing record that each worker signs, and a short review when the task ends. The same kind of document is called a method statement, a safe work method statement (SWMS), a safe work procedure (SWP) or a task risk assessment, and the names, and the work for which one is required, vary by country and employer; this form does not say whether your task needs one. It is not a job safety analysis (a worksheet that analyses the hazards of a job), not a permit to work (an authorisation, with isolations, to start a particular hazardous work), not a toolbox talk (a short briefing on a topic) and not a contractor induction record (a one-off induction to the site). Refer to those by reference, do not copy them in. The headings, the control-type codes and the example row are ours, to change.

1 Task and day

Task title (what is being done)		Method statement reference and revision	
Project and site		Principal or main contractor, and client if different	
Location of the task (area, level, grid line)		Date and shift (from, to)	
Prepared by (name, role)	Supervisor in charge for the shift (name, phone)		Task lead, if different (name, phone)
Related risk assessment, JSA or procedure (reference)		Drawings, specification or maker's instructions relied on	
This task involves (tick any) ☐ Work at height ☐ Confined or restricted space ☐ Lifting ☐ Excavation or trench ☐ Electrical or energised services ☐ Hot work ☐ Plant and vehicle movement ☐ Hazardous substances ☐ Demolition or structural alteration ☐ Other			

2 Who is doing the task, and who supervises

Name	Employer or company	Role on this task	New to the task, young or in training? (say who supervises them)

3 Steps in order, hazards and controls

No.	Step, in order (what is done)	Hazards (what could go wrong, who could be hurt)	Controls, highest first	Type	Who
Ex.	Example: lift the first bundle of sheets to the roof edge	Example: load swings or drops; people below; wind catches the load	Example: exclusion zone below, tag line, lift stopped in wind over the limit in this statement	C, A	Lead

Control type (our own codes, in order of effect): **E** eliminate the hazard or the task at height or in the hazardous area; **S** substitute with something less hazardous; **C** control at source or isolate (guards, barriers, edge protection, isolation); **A** administrative (exclusion zone, sequence, signs, supervision, time limits); **P** protective equipment worn. Write the highest control that can be used first, name it exactly (not "use suitable PPE") and say who puts it in place. Do not leave a step to a worker's judgement on the day.

4 Plant, equipment and materials

Item (plant, access equipment, tools, materials)	Checked before use (initials, time)	Inspection or test tag, or certificate valid to	Operator or user, and their authorisation

Hazardous substances used (name, safety data sheet reference)

Loads and materials: weights, how they are delivered, stored and moved

5 Permits and isolations needed (reference only; this form does not issue them)

Needed for this task (tick any)

☐ Hot work
 ☐ Confined space entry
 ☐ Work at height
 ☐ Electrical isolation
 ☐ Lock-out of plant
 ☐ Excavation or dig
 ☐ Lifting
 ☐ Other
☐ None needed

Permit or isolation type	Reference no.	Issued by	Valid from, to	Condition that changes this method

6 Competence and training checked

Checked before the task starts (tick)

☐ Tickets, licences or certificates sighted
 ☐ Task training or instruction confirmed
 ☐ Site induction done
☐ Anyone new to the task has a named supervisor (section 2)
☐ Language or reading support arranged

What was checked, by whom (name, date)

Anyone not yet competent for a step: what they will do, and who is with them

7 Emergency arrangements

Nearest first aider (name, phone) and first aid kit (where)		Muster point and the route to it
Emergency number, and how an alarm is raised from where the task is (radio, phone, whistle, air horn)		Where emergency services are met, and who meets them
Rescue plan needed? (a person suspended, trapped or overcome) ☐ Yes ☐ No ☐ Not applicable	Rescue plan: who rescues, with what equipment, how quickly, and has it been tried? _____ _____	

8 Coordination with other trades

Other trade or party	What they do, and where	Shared risk or clash (overhead, below, same access, services)	What was agreed, and who was told

Anyone doing this task, or working near it, can stop it, at once and without asking, if they see a danger or the task is not going as this statement says. They tell the supervisor in charge. Work does not restart until the supervisor, or the person named below, has agreed that it can go on as written, or a changed method has been agreed and briefed to everyone affected. No one is blamed for stopping work in good faith.

Stop-work contact for this task (name, phone)	Who can say the task may restart (name, role)
Conditions that stop this particular task (for example wind or rain over the limit, a failed check, an unplanned service, someone in the exclusion zone)	

Each worker signs **after** the briefing and writes Y if they understood their part, or the question they still have. Anyone who joins after the briefing is briefed before they start and signs on the next free line.

Briefed by (name, role)		Date	Time	Where, and how the statement was explained (read through, walk round, demonstration)	
Name (print)	Company	Signature	Time briefed	Understood? (Y, or the question)	
How understanding was checked (for example, each worker explained their steps, the stop-work rule and the muster point)					

A signature shows who was there. It does not show that the person understood, or agreed, so ask.

Did the task go as planned? ☐ Yes ☐ Partly ☐ No	Work left safe, area handed back (how, to whom)
What differed from the statement (steps, plant, people, weather, other trades)	
Near misses, incidents or stop-work events (what happened, report reference)	
Changes needed to this method statement before it is used again, and who will make them	

Role	Name	Signature	Date
Prepared by			
Supervisor in charge			
Site manager (if needed)			