Toolbox Talk - Vendor Handoffs and Evidence

Todd Jerome Jenkins | v2.0 | October 13, 2026 | 5–10 minutes plus field checks

What and why

A vendor handoff joins supplier knowledge with local conditions, responsibilities and acceptance evidence. A vendor may know its equipment well and still be unfamiliar with this site's hazards or release process. The site team may understand local conditions but miss a product limitation.

Objective: Confirm one vendor interface, its shared control and the evidence required before acceptance or use.

When and where

Before contracted work, at scope changes and before accepting or using a deliverable. At site and off-site interfaces, including service visits and document deliveries.

How to use it

- Exchange scope, hazards, local restrictions and relevant instructions. Name who resolves conflicts and approves changes.
- Assign who establishes, verifies and maintains each shared control. Confirm required competence and actual availability.
- Agree acceptance evidence and open-item handling before handover. Vendor confidence does not replace required inspection or records.

Verify It in the Field

Give two people paper roles that each assume the other owns a check. Have them identify the gap and assign it explicitly.

Ask real site and vendor contacts to explain the same interface. Reconcile answers against the approved responsibility arrangement.

Match acceptance evidence to the actual item, revision and scope. Record prescribed check results, verifier, time and remaining restrictions.

Failure points and stop triggers

Unclear scope; incompatible site and vendor instructions; unbriefed personnel; missing product records; changed equipment; two parties assuming the other verified a control; completion mistaken for readiness. Hold affected work or reliance for conflicting instructions, unidentified responsibility, missing evidence or a change outside the agreed scope. Make the task safe through its procedure and contact the designated authorities.

Toolbox talk questions

1. What local condition could the vendor miss?
2. Who owns this control through release?
3. What evidence supports accepting this deliverable?

Use the separate supervisor field check and attendance sheet. Practice is not qualification or work authorization.

Source: DOE-HDBK-1028-2009, Vol. 2, printed pp. 68–69. References and task-specific limits on the webpage.

Next step: Apply this skill to one step on the free JHA/JSA field-verification worksheet.

Expanded guidance and separate forms: toddjeromejenkins.com/toolbox-talks/vendor-interfaces-handoff-evidence

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