Toolbox Talk - Getting Help with Unfamiliar Work

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

What and why

A useful request for expertise explains the actual situation, the unknown and the decision needed. Getting help requires the right person and a clear question. For unfamiliar work, explain what is known, what remains uncertain and which action must wait.

Objective: Prepare a useful technical consultation and confirm that its answer applies to the actual work before relying on it.

When and where

When the situation is unfamiliar, instructions do not fit or the answer exceeds the team's authority. At a safe hold point, whether help is local or remote.

How to use it

- State the item, configuration, observed facts and unresolved question. Keep assumptions separate and collect information safely.
- Contact the appropriately qualified and authorized role. Confirm who can answer and who approves the work method.
- Compare advice with actual conditions. Obtain required approval, checks and rebriefing before relying on the answer.

Verify It in the Field

Give a partner a fictional "it does not match" request. Add identity, expected condition, observed condition and question until it can be understood.

Confirm the real specialist received the current information and identified any missing facts. A sent message is not a resolved question.

Verify assumptions and affected controls through prescribed checks. Record actual results and authorization; general advice does not release work.

Failure points and stop triggers

Asking a vague question; advice based on the wrong configuration; experience mistaken for authorization; unsupported assumptions; remote help without enough information; trial-and-error action before the review. Keep affected work held when the right expertise is unavailable, the question remains unresolved or the answer depends on unverified facts. Escalate through the site process.

Toolbox talk questions

1. What exact question needs expertise beyond this crew?

2. Who can answer it and who authorizes the method?

3. Which assumption in the answer needs field evidence?

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

Source: DOE-HDBK-1028-2009, Vol. 1, printed pp. 2-25–2-27. 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/unfamiliar-work-expert-consultation

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