

How to use your documents

From draft to site: a practical guide for KK Tradie Docs clients

Your documents only do their job once they match how you actually work and your crew knows what is in them. This guide takes you through what to do with them, from the first draft to the last day on site.

How it works with us

1

We send a draft

Prepared from our Victorian templates and your intake form, with your business name, ABN and logo. Every page is watermarked DRAFT. Anything we added that did not come from you is highlighted.

2

You check and change

You read it, check it against the job, talk to your workers and tell us what to change. Two rounds of changes are included.

3

You approve, we issue

Once you approve the draft in writing and the balance is paid, we send the final in Word and PDF with no watermark.

A draft is never for site. Anything marked DRAFT is unfinished. Do not use it on site or send it to a builder.

Before the documents go on site

1 Read all of it against the real job

Go through every step, hazard and control and ask: is this how we will do it on this site? Fill in every highlighted field. Take out anything that does not apply, and add anything that is missing. A SWMS that describes work you are not doing is as unhelpful as one that leaves work out.

2 Check it on site

Walk the site, or go through the builder's site information, and add what is particular to this job: access, slopes, overhead and underground services, other trades working nearby, the public, and the builder's site rules.

3 Talk it through with your workers

The people doing the work know it best, and the law expects them to be consulted, along with any health and safety representative. Go through the SWMS together and make the changes they raise.

4 Approve and sign it yourself

You approve and sign the document as the business doing the work. We do not sign, approve or certify any document. If the builder wants to review it first, send it to them and make any changes they ask for.

5 Brief everyone and get sign-on

Before the high risk work starts, take each worker through the SWMS and have them sign the sign-on page. Anyone who joins the job later does the same before they start. Record the briefing on a Toolbox Talk Record.

While the job is running

Keep it within reach

Keep the SWMS where workers can get to it, on paper in the site folder or ute, or as the PDF on a phone or tablet. It has to be kept for as long as the high risk work is going on. Most businesses then file it with the job records.

Work to it

The work has to be done the way the SWMS says. If it is not, the high risk work stops as soon as it is safe to stop, and does not restart until the work matches the SWMS or the SWMS has been reviewed and revised.

Review it when things change

Review and revise the SWMS when:

- the work or the way you do it changes
- site conditions change
- a control is not working
- there is an incident or a near miss.

Write the change in the review record at the back of the SWMS and in your SWMS Register & Review Log, then brief your workers again and get fresh sign-on.

Using a SWMS on your next job

A SWMS is written for one job. For the next site you can start from the same document, but it needs its own check before it is used: update the site address, builder and date, tick the high risk work that applies on that site, go back through steps 1 to 5, and get new sign-on. If the work is different, or you would rather we do it, ask us for a new job-specific version.

Who does what

KK Tradie Docs

- Prepares your documents from our Victorian templates and the information you give us
- Puts your business name, ABN, logo and contact details on every page
- Highlights anything added that did not come from you
- Makes the changes you ask for and issues the final Word and PDF files

Your business

- Gives us accurate, complete information and tells us when it changes
- Reviews every document and checks it matches how the work will be done on each site
- Consults workers, then approves and signs
- Makes sure workers are inducted, signed on and hold the licences and tickets the work needs
- Keeps documents under review and up to date

We do not visit or inspect sites, supervise work, or give OHS, engineering or legal advice. Under the Occupational Health and Safety Act 2004 (Vic), your duties as an employer or self-employed person stay with you.

This guide is a plain-language summary to help you use your documents. It does not replace the Occupational Health and Safety Act 2004 (Vic), the Occupational Health and Safety Regulations 2017 (Vic) or our Terms of Engagement. More information: WorkSafe Victoria, [worksafe.vic.gov.au](https://www.worksafe.vic.gov.au).

Your site forms: when to use each one

Form	Use it	Who fills it in
Site Induction Record	Before each worker starts on a site for the first time.	Supervisor and the worker, who both sign.
Toolbox Talk Record	At every toolbox talk, including the SWMS briefing and any time the SWMS changes.	Whoever runs the talk. Everyone attending signs.
Plant & Equipment Pre-Start Checklist	Before a machine or item of powered equipment is first used each day. A fault means it is tagged out until fixed.	The operator.
Hazard Report	Whenever someone spots a hazard that is not controlled.	Anyone on the job. The supervisor records the fix.
Incident & Near Miss Report	After any injury, damage or near miss. Notifiable incidents must also be reported to WorkSafe Victoria immediately on 13 23 60.	Supervisor, with the people involved.
SWMS Register & Review Log	When a SWMS starts being used, and each time one is reviewed.	Supervisor or business owner.
Hazardous Chemicals Register	When a hazardous chemical comes onto site. Keep a current safety data sheet (under 5 years old) for each one where workers can read it.	Supervisor or business owner.
Crystalline Silica Hazard Control Statement	Before high risk crystalline silica work starts. Keep it at the workplace while that work is done, and review it if the work changes or a control is not working.	Business owner, with the workers doing the task.
Subcontractor Compliance Checklist	Before a subcontractor starts work for you, or when a builder asks for your insurances, licences and tickets.	Business owner.

Keep completed forms with the job records. Builders often ask to see them, and they are your record of what was done.

A simple review routine

EACH NEW JOB

- Check the SWMS against the site
- Fresh worker sign-on
- Add it to the SWMS Register

EACH MONTH, 10 MINUTES

- Registers up to date
- Toolbox talks held and recorded
- Hazards and incidents closed out
- Anything expiring soon

EACH YEAR

- Read your plan, policies and handbook
- Update the tender pack and certificates
- Sign and date them again

STRAIGHT AWAY

- The work or method changes
- Site conditions change
- A control is not working
- An incident or near miss

The monthly and yearly checks are a habit, not a legal timetable: a SWMS has to be reviewed when things change, whatever the date.

Found something to change? Mark it on the document or email us. We update it with a new version number and date for you to check, approve and sign. Whether a control is adequate stays your decision. One-off updates and two optional monthly plans are in our Price Guide.

Plans, policies and tender packs

Document	How to use it
OHS Management Plan	Read it through and make sure it describes how your business really operates: who is responsible for what, and how you handle inductions, training, incidents and subcontractors. Sign and date it, give it to builders who ask for it, and review it at least once a year or when your business changes.
Safety Policies & Procedures	Sign and date each policy. Show them to your workers and keep a copy where they can read it. Follow the procedures in practice: a builder or inspector may ask to see that you do.
Site Induction Handbook	Give it to every new worker and subcontractor, go through it with them, and record it on a Site Induction Record.
Toolbox Talks	Pick the topic that fits the week's work, run the talk, and record it on a Toolbox Talk Record.
Tender & Prequalification Pack	Check every statement, insurance, licence and past project is accurate and current before it goes out. You decide all pricing, and you lodge the submission unless we have agreed in writing to upload it for you.

Common questions

Do I need a SWMS for every job?

The law requires one when the job includes high risk construction work, such as work where someone could fall more than 2 metres, work near powered mobile plant, or work on or near energised electrical services. Many builders ask for one from every trade regardless. Our guide *Which documents does your job need?* lists what each trade usually needs.

Can I change the documents myself?

Yes. Once the job is paid in full, the final Word files are yours to use, copy and change for your own business. They cannot be resold or handed to another business to use as its own.

The builder has come back with changes. What now?

Send us their comments. Changes during the draft stage come out of your two included rounds. After the final has been issued you can edit the Word file yourself, or ask us for a quote to update it.

Do my workers have to sign on paper?

What matters is that each worker has been taken through the SWMS and you can show it. Ask your builder what they accept: many are happy with a photo or scan of the signed page.

Will you sign the SWMS as the person who prepared it?

No. We prepare the document for you, but it is your SWMS. Your business is named as the one that prepared, approved and signed it.

I am not sure a control will work on my site. Who can I ask?

That decision sits with you as the business doing the work. Talk to the builder's site supervisor, call the WorkSafe Victoria Advisory Service on 1800 136 089, or engage an OHS consultant. Then tell us what to change and we will update the document.

Changes or a new document
tally.so/r/dWBIRr

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