

IMPLEMENTATION GUIDE

SET UP YOUR SOPS. TRAIN YOUR TEAM.

A step-by-step guide to personalising your Safe Operating Procedure templates, with screenshots of every section, and how to use them to train and check your workers.



Before you start, have these handy

- ✔ Your business name and logo (PNG or JPG)
- ✔ The manufacturer's instructions for the plant or equipment
- ✔ A worker who does the task well, to walk through it with you
- ✔ The names of the workers you'll train on the SOP

HOW YOUR SOPS WORK

A Safe Operating Procedure (SOP) is a step-by-step instruction for doing one task safely, from the checks before you start to shutting down and cleaning up.

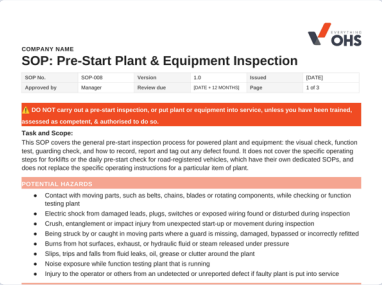
WHS laws require you to give workers the information, training and instruction they need to do their work safely. A written SOP is one of the simplest ways to do that, and to show you've done it.

SOPs work alongside your SWMS and JSAs. The SWMS or JSA assesses the risks of a job. The SOP shows workers exactly how to do the task.

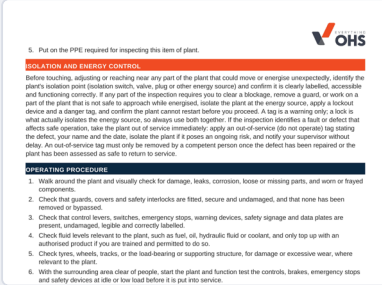
Your template is a strong starting point, not the finished product.

Each SOP is written for how the task is usually done. Your job is to check it against *your* equipment, *your* workplace and how *your* workers actually do it, then change anything that doesn't match.

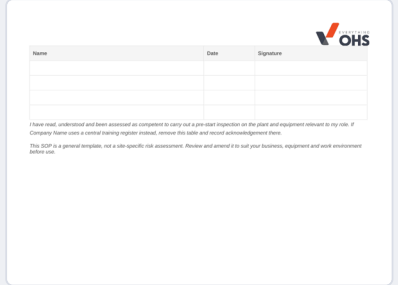
WHAT'S INSIDE YOUR SOP



Page 1
Business details and control table, warning, task and scope, hazards, PPE, related documents, pre-operational checks



Page 2
Isolation and energy control, operating procedure, shutdown and housekeeping, emergency situations



Page 3
Competency acknowledgement, signed by each worker once they've been trained

SIX STEPS TO AN SOP THAT'S READY TO USE

Don't just fill in the blanks. At every step, read what's there and edit anything that doesn't match your equipment, your workplace or how your workers do the job.

1 Add your business details and logo

Header, control table, version and dates

2 Review the warning, scope, hazards and PPE

Edit them to suit your equipment and site

3 Check documents and pre-start checks

Match them to your own procedures

4 Review and edit the procedure steps

Make them match how the task is done

5 Check emergency steps and consult workers

Make changes based on what they tell you

6 Train workers and sign off competency

Then keep it where workers can use it

STEP 1

ADD YOUR BUSINESS DETAILS AND LOGO

Open your SOP in Microsoft Word or Google Docs. Your logo sits in the header, and the details sit at the top of page 1.

1

2

3



COMPANY NAME

SOP: Pre-Start Plant & Equipment Inspection

SOP No.	SOP-008	Version	1.0	Issued	[DATE]
Approved by	Manager	Review due	[DATE + 12 MONTHS]	Page	1 of 3

The top of page 1

1 Swap our logo for yours

Word: double-click the logo to open the header, right-click the logo and choose *Change Picture > From a File*, then double-click the page body to close the header. **Google Docs:** click the logo, then *Replace image*. It changes on every page.

2 Replace COMPANY NAME, everywhere it appears

Your business name also appears in the body of the SOP, such as the emergency section and the competency note. Use *Find and Replace* (Ctrl + H in Word and Google Docs) to replace *Company Name* in one go, then check each one reads properly.

3 Complete the control table

SOP No. and **Version:** keep our numbering or change it to fit your own system. Start at version 1.0. **Issued:** the date you finalise the SOP. **Review due:** usually 12 months later. **Approved by:** the name and role of the person who signs it off. The page count updates itself.



ACME INDUSTRIES PTY LTD

SOP: Pre-Start Plant & Equipment Inspection

SOP No.	SOP-008	Version	1.0	Issued	06/10/2026
Approved by	Alex Nguyen	Review due	06/10/2027	Page	1 of 3

Want it in your brand colours? The orange and peach section bars are table shading. In Word, click in a bar, open the *Table Design* tab and choose a new *Shading* colour. Keep the red emergency heading red, so it stands out.

STEP 2

REVIEW THE WARNING, SCOPE, HAZARDS AND PPE

The rest of page 1 tells workers who can do the task, what it covers, what can go wrong and what to wear.

A

⚠ DO NOT carry out a pre-start inspection, or put plant or equipment into service, unless you have been trained, assessed as competent, & authorised to do so.

B

Task and Scope:

This SOP covers the general pre-start inspection process for powered plant and equipment: the visual check, function test, guarding check, and how to record, report and tag out any defect found. It does not cover the specific operating steps for forklifts or the daily pre-start check for road-registered vehicles, which have their own dedicated SOPs, and does not replace the specific operating instructions for a particular item of plant.

C

POTENTIAL HAZARDS

- Contact with moving parts, such as belts, chains, blades or rotating components, while checking or function testing plant
- Electric shock from damaged leads, plugs, switches or exposed wiring found or disturbed during inspection
- Crush, entanglement or impact injury from unexpected start-up or movement during inspection
- Being struck by or caught in moving parts where a guard is missing, damaged, bypassed or incorrectly refitted
- Burns from hot surfaces, exhaust, or hydraulic fluid or steam released under pressure
- Slips, trips and falls from fluid leaks, oil, grease or clutter around the plant
- Noise exposure while function testing plant that is running
- Injury to the operator or others from an undetected or unreported defect if faulty plant is put into service

D

PPE REQUIRED

Hard Hat	Steel Cap Boots	Ear Protection	Eye Protection	Protective Gloves	P2 Mask	Sun Protection	High Vis Clothing
							
☐	☒	☒	☒	☒	☐	☐	☐

Additional PPE: hard hat and high visibility clothing where required by the work area or the item of plant being inspected, and any additional PPE specified for that plant's safe operation.

- A**

The warning bar

Says who is allowed to do the task. Leave it in. If your business needs a licence, ticket or written authorisation for this task, add it here.
- B**

Task and scope

Check it describes the task as your workers do it, with your equipment. Name the make and model if the SOP is for one machine. Note anything it doesn't cover.
- C**

Potential hazards

Add any hazards specific to your equipment or site, such as working near the public, in heat or in a tight space. Delete any that genuinely don't apply.
- D**

PPE required

Tick every item workers must wear. In Word, click a box to tick it. In Google Docs, delete the box and type an X. Use the *Additional PPE* line for anything not pictured.

Check the manufacturer's instructions. They often list specific hazards, PPE and checks for that make and model. Anything they require should be in your SOP.

STEP 3

CHECK RELATED DOCUMENTS AND PRE-START CHECKS

These link the SOP to your other procedures and set out what workers check before they start.

RELATED DOCUMENTS

- Plant and equipment maintenance procedure
- Hazardous energy isolation (lockout and tagout) procedure
- Forklift operation and pre-start procedure, for the specific pre-start and operating steps for forklifts
- Vehicle pre-start and daily check procedure, for road-registered vehicles
- Incident and hazard reporting procedure
- Site-specific SWMS or JSA, where the plant is used as part of high risk construction work

PRE-OPERATIONAL CHECKS

1. Confirm you are trained and authorised to carry out a pre-start inspection on the specific item of plant.
2. Obtain the correct pre-start checklist or logbook for the item of plant, if your workplace uses one.
3. Check the plant is not currently displaying an out-of-service or danger tag, and review any outstanding fault reports or recent maintenance history if available; if it is tagged out, do not remove the tag or use the plant.
4. Confirm the area around the plant is clear of bystanders, other workers, clutter and trip hazards before you begin.

A Related documents

Change the names to match the documents your business actually uses, for example *SOP-004 Lockout and Tagout*. If a document doesn't exist yet, either create it or delete the line.

B Pre-operational checks

The checks a worker does before starting. Make sure they match your equipment and workplace, including any checklist or logbook you use. The list carries on at the top of page 2.

Editing numbered steps

Click at the end of a step and press Enter to add a new one. The numbers update themselves. To remove a step, select the whole line and press Delete.

WRITE CHECKS WORKERS CAN ACTUALLY DO

- ✓ Keep to one check per step, starting with an action word: *Check, Confirm, Inspect*.
- ✓ Say what "good" looks like, for example "no cuts or exposed wires in the lead".
- ✓ Say what to do if a check fails, usually tag it out and tell a supervisor.
- ✓ Use the words your workers use on site, not the manual's jargon.

STEP 4

REVIEW AND EDIT THE PROCEDURE STEPS

This is the heart of the SOP: how to make the equipment safe to work on, and how to do the task, step by step.

ISOLATION AND ENERGY CONTROL

Before touching, adjusting or reaching near any part of the plant that could move or energise unexpectedly, identify the plant's isolation point (isolation switch, valve, plug or other energy source) and confirm it is clearly labelled, accessible and functioning correctly. If any part of the inspection requires you to clear a blockage, remove a guard, or work on a part of the plant that is not safe to approach while energised, isolate the plant at the energy source, apply a lockout device and a danger tag, and confirm the plant cannot restart before you proceed. A tag is a warning only; a lock is what actually isolates the energy source, so always use both together. If the inspection identifies a fault or defect that affects safe operation, take the plant out of service immediately: apply an out-of-service (do not operate) tag stating the defect, your name and the date, isolate the plant if it poses an ongoing risk, and notify your supervisor without delay. An out-of-service tag must only be removed by a competent person once the defect has been repaired or the plant has been assessed as safe to return to service.

OPERATING PROCEDURE

1. Walk around the plant and visually check for damage, leaks, corrosion, loose or missing parts, and worn or frayed components.
2. Check that guards, covers and safety interlocks are fitted, secure and undamaged, and that none has been removed or bypassed.
3. Check that control levers, switches, emergency stops, warning devices, safety signage and data plates are present, undamaged, legible and correctly labelled.
4. Check fluid levels relevant to the plant, such as fuel, oil, hydraulic fluid or coolant, and only top up with an authorised product if you are trained and permitted to do so.
5. Check tyres, wheels, tracks, or the load-bearing or supporting structure, for damage or excessive wear, where relevant to the plant.
6. With the surrounding area clear of people, start the plant and function test the controls, brakes, emergency stops and safety devices at idle or low load before it is put into service.
7. While the plant is running, look and listen for unusual noise, vibration, smoke, odour or fluid leaks.
8. Record the inspection outcome on the plant's checklist or logbook, noting any defect found. Do not put the plant into service if a check cannot be completed or a defect affecting safe operation is found; report and tag it out of service instead.

A Isolation and energy control

Check it names the isolation points on *your* equipment, such as the main switch, valve or plug, and how your workers lock and tag it out. Point to your lockout procedure if you have one.

B Operating procedure

Read it step by step while a competent worker does the task. Add missing steps, remove steps that don't apply and put them in the order the work is actually done.

MAKE IT MATCH HOW YOUR TEAM WORKS

- ✓ **Watch the task being done** by someone who does it well, and compare it to the SOP line by line.
- ✓ **Add your own settings**, such as speeds, pressures, guards or attachments for your equipment.

- ✓ **Keep safety steps in.** Don't remove guarding, isolation or PPE steps to make the SOP shorter.
- ✓ **Flag the critical steps.** Bold any step where getting it wrong could seriously hurt someone.

One SOP, one task. If you have very different machines doing a similar job, copy the SOP and make one for each, rather than squeezing them into one document.

STEP 5

CHECK EMERGENCY STEPS AND CONSULT WORKERS

The end of page 2 covers shutdown, clean up and what to do when something goes wrong.

SHUTDOWN, HOUSEKEEPING AND POST-OPERATION

1. If the plant passes inspection, sign off the checklist or logbook and proceed to its specific operating SOP before use.
2. If the plant fails inspection, confirm it is isolated and tagged out of service, and notify your supervisor so repair or assessment can be arranged.
3. Do not return the plant to service until a competent person confirms the defect has been fixed and removes the out-of-service tag.
4. Return the completed checklist or logbook to its designated location, and clean up any spilled fluids or debris created during the inspection.
5. Report any near misses, or difficulty completing the inspection, to your supervisor.

EMERGENCY AND ABNORMAL SITUATIONS

If plant starts or moves unexpectedly during inspection, if a fire, electric shock or fluid release occurs, or if a person is injured, stop work immediately, isolate the plant if safe to do so, and follow Company Name's emergency and incident reporting procedures. Do not attempt to free a trapped person or repair the plant yourself; call for help and keep others clear.

This SOP does not cover every hazard associated with this task and should be used alongside site-specific training, the specific operating procedure for the item of plant, and any relevant SWMS or JSA. It is not a substitute for proper instruction.

A Shutdown, housekeeping and post-operation

Check the shutdown steps suit your equipment, and that cleaning, storage and reporting steps match how your workplace runs.

B Emergency and abnormal situations

Make sure it lines up with your emergency procedures. Workers should know where the emergency stop, first aid kit and fire extinguisher are, and who to call.

C The limitations note

Reminds readers the SOP works alongside site training, the plant's own instructions and any SWMS or JSA. Leave it in.

TALK TO THE WORKERS WHO DO THE TASK

Your workers know where the task goes wrong. Before you finalise the SOP, walk them through it and ask:

- ✓ Is this how we actually do it?
- ✓ Is anything missing or in the wrong order?
- ✓ Is anything unclear or hard to follow?

Make the changes they raise, then have the manager or supervisor approve the SOP and fill in the **Approved by** and **Issued** fields.

Consulting workers on health and safety matters is a legal duty under WHS laws, and it gives you an SOP people will actually follow.

STEP 6

TRAIN WORKERS AND SIGN OFF COMPETENCY

An SOP only works once workers have been trained on it and shown they can do the task safely.

1

Name	Date	Signature
Sam Taylor	06/10/2026	S. Taylor
Jordan Lee	06/10/2026	J. Lee

2

I have read, understood and been assessed as competent to carry out a pre-start inspection on the plant and equipment relevant to my role. If ACME Industries Pty Ltd uses a central training register instead, remove this table and record acknowledgement there.

This SOP is a general template, not a site-specific risk assessment. Review and amend it to suit your business, equipment and work environment before use.

The competency acknowledgement on page 3, filled in

- 1

Train, check, then sign

Talk the worker through the SOP, show them the task, then watch them do it. Once they can do it safely, they sign and date the table. Add rows if you need them.
- 2

Using a training register?

If you record training in a central register instead, delete this table and record the sign-off there, as the note in the SOP says.

USING YOUR SOPS EVERY DAY

Keep them where the work is

Print and laminate a copy for near the machine, or keep it on a phone or tablet. Workers should be able to check it without hunting for it.

Use them for inductions

Build your SOPs into new worker inductions, and use them for refresher training and toolbox talks.

Check the work matches

Supervisors should watch tasks being done from time to time and correct anyone skipping steps.

Keep your records

Keep signed competency records and old versions of each SOP. They show who was trained, on what, and when.

WHEN TO REVIEW YOUR SOPS

1

By the review due date

Usually every 12 months. Check it still matches the equipment and how the task is done.

2

When something changes

New equipment, a new model, a new attachment or a change to how the task is done.

3

After an incident or near miss

Find out what went wrong and update the steps.

4

When a worker raises a concern

If a step doesn't work in practice, fix the SOP, not just the job.

After any update, change the version number, issued date and review due date, then retrain the workers on what's changed and have them sign again.

QUICK CHECKLIST: IS YOUR SOP READY?

- | | |
|---|--|
| ☐ Your logo in the header | ☐ Pre-operational checks and isolation steps match your equipment |
| ☐ Company Name replaced everywhere it appears | ☐ Operating steps checked against how the task is really done |
| ☐ SOP number, version, issued date and review due date filled in | ☐ Emergency steps line up with your emergency procedures |
| ☐ Approved by completed | ☐ Workers consulted and their input included |
| ☐ Task and scope match your equipment and task | ☐ Workers trained and competency signed off |
| ☐ Hazards and PPE checked and ticked | |
| ☐ Related documents match your own procedures | |

Need a hand?

Get in touch through the Everything OHS website at workplace-safety.com.au and we'll help you get your SOPs sorted.

Disclaimer: We cannot, and do not, give you legal or any other professional advice. While every reasonable effort has been made to ensure that the information we provide is comprehensive, accurate and clear, it may not cover your particular circumstances. Only you are aware of the purpose for which you intend to apply a product or service you order from us. For this reason we provide this to you on an "as is" basis, and it does not constitute legal or professional advice of any kind. If you do require personalised legal or professional advice we recommend that you consult a suitably qualified person. If you think you may have noticed any error or omission, please let us know through the Everything OHS website.