WHS DOCUMENTS & TEMPLATES

DOC-NSO-KIT · New Safety Officer Starter Kit

Product Overview

For: New safety officers, advisers and coordinators, and the managers who appoint them, in workplaces of every kind

Version 1.0 · 20 November 2026

Start a new health and safety role with a plan: learn the business, find the serious risks and the gaps, set priorities by risk, and keep the recurring work on schedule.

The first months in a safety role set the tone for everything after. This kit gives a new safety officer, adviser or coordinator a clear plan and the working tools to go with it, so you spend your time on the risks that matter, not on building spreadsheets.

The First 90 Days Plan takes you from learning the business, through the risk profile and the gaps, to priorities and quick wins, with who to meet, what to read, what to look at on site and questions to ask. The WHS Calendar schedules the recurring activities for 12 months, with due and overdue flags and a month view. The Legal and Other Requirements Register, the Key Contacts and Responsibilities sheet and the Gap Assessment Checklist complete the set, with a guide on the role, influence without authority and prioritising by risk.

Written to work in any country, with Australian law as the worked example. The guide says what to check where you work. In Australia, its state and territory notes show where the law differs, including the regulator to contact. Made by Orana Skills Centre.

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How to Use This Kit

Getting started in a health and safety role with this kit, and which document to use when

1 What this kit is for

This kit is for someone starting in a health and safety role: a new safety officer, adviser or coordinator, or a manager who has been given health and safety as part of the job. It gives you a plan for the first three months and the working tools to go with it.

Start with the Guide for New Safety Officers, then work through the First 90 Days Plan. The other documents are the tools the plan uses. The table below shows which to use when.

Document	When to use it
Guide for New Safety Officers	Before you start, and when you are stuck: the role, influence, priorities
First 90 Days Plan	From your first day: the three phases, check-ins and the day 90 report
Key Contacts and Responsibilities	In your first two weeks; post it, and check it every six months
Gap Assessment Checklist	Weeks 3 to 6, and again each year as a health check
Legal and Other Requirements Register	From weeks 3 to 6; review it each year and when the law changes
WHS Calendar	From weeks 3 to 6, then every week: what is due, what is overdue

2 How to use it

Step	What to do
1	Read the Guide for New Safety Officers.
2	Put in your logo and business name, and fill in or delete the placeholders in each document.
3	Agree the First 90 Days Plan with your manager in your first week, and book the check-ins at weeks 2, 6 and 12.
4	In weeks 1 and 2, meet people, read the records and walk every site on every shift. Fill in the Key Contacts sheet.
5	In weeks 3 to 6, build the risk profile, run the Gap Assessment Checklist, and start the register and the WHS Calendar.
6	In weeks 7 to 12, agree priorities with the managers who own the risks, deliver quick wins, and report at day 90.
7	After that, run the WHS Calendar every week, review the register each year, and repeat the gap assessment each year.

Make it work, not just exist

- Listen and look before you change anything.
- Spend most of your time where the work is, on every shift.
- Prioritise by how badly someone could be hurt, not by who is loudest.
- Give actions to the managers who own the risks, and follow them up.

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YOUR LOGO
Right-click > Change Picture

[Company name]

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First 90 Days Plan

Your first three months in the health and safety role at [Company name]: learn the business, build the risk profile, then set priorities and deliver quick wins

Name and role		**Start date**	
Reports to		**Sites and work covered**	
Check-ins booked (weeks 2, 6 and 12)		**90-day review date**	

How to use this plan

- Work through the three phases in order. Listen and look first, then assess, then act. Changing things before you understand the work is the most common mistake in a new safety role.
- Agree the plan with your manager in your first week, and book the three check-ins now.
- Tick each item as you finish it and write down what you found. Your notes become the risk profile, the gap assessment and your report at day 90.
- Adapt it. A small business may move faster; a large or high-risk business may need longer for phase 2. If you find something that could seriously hurt someone, act on it straight away, whatever the phase.

Phase 1 Weeks 1 to 2: learn the business

Goal: understand the work, the people, the risks they live with, and how health and safety is managed now.

Who to meet

Who	Why	Questions to ask	Done
Your manager, and [Chief executive or owner]	What they expect of the role, and how decisions and spending are approved	What does success look like at 90 days and at a year? Which health and safety issue worries you most?	☐
Senior and site managers	They own the risks, the people and the budget in their areas	What are the biggest risks in your area? What has been tried before? What do you need from me?	☐
Supervisors and team leaders	They run the work every day and know where it really differs from the procedure	Which jobs worry you? Where do the procedures not match the work? What slows you down?	☐
Workers on every site and shift, including night shift	They know the hazards best, and they decide whether to trust you	What could seriously hurt someone here? What would you fix first?	☐
Health and safety representatives and the committee	They represent workers, and are your strongest allies	What issues have been raised and not fixed? How does consultation work now?	☐
First aiders, wardens and the emergency coordinator	They know how ready the site is for an emergency	When was the last drill? What went wrong? What equipment is missing?	☐
HR and the return to work coordinator	Injuries, claims, return to work, training records, the EAP	What injuries and claims have we had? Where are the training and licence records?	☐

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YOUR LOGO
Right-click > Change Picture

[Company name]

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Gap Assessment Checklist

A quick health check of [Company name]'s health and safety system against its main elements, with a summary and priority actions

Business and sites		**Assessed by**	
Date		**People spoken to (roles)**	

How to use this checklist

- This is a quick health check of the safety system, not a full audit. Allow half a day to a day for a small or medium business.
- For each check, look for evidence: a record, a conversation, or the work itself. Tick Yes (in place and working), Partly (in place but incomplete, out of date or not used), or No.
- Write what you saw in Evidence or notes. Delete checks that do not apply and add your own.
- Fill in the summary at the end, then turn the gaps into priority actions in your First 90 Days Plan.

1 Policy, leadership and responsibilities

Check	Yes	Partly	No	Evidence or notes
A health and safety policy is current, signed by the top manager and known to workers	☐	☐	☐	
Health and safety responsibilities are set out for every level: managers, supervisors, workers and contractors	☐	☐	☐	
Senior managers and officers receive regular health and safety reports and act on them	☐	☐	☐	
There is a budget and time for health and safety work	☐	☐	☐	
The laws, codes, standards and licences that apply are known, and someone keeps track of them	☐	☐	☐	

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END OF THE FREE SAMPLE

This sample shows a few pages, so you can judge the layout and the quality. Start a new health and safety role with a plan: learn the business, find the serious risks and the gaps, set priorities by risk, and keep the recurring work on schedule.

What the full product contains

- **Excel WHS calendar: a 12-month schedule of recurring activities (inspections, consultation, toolbox talks, drills, first aid checks, testing and tagging, plant inspections, licence and VOC expiries, audits, management review, training and reporting) with next due dates, due and overdue flags, and a month view. It includes the inspection and consultation schedule**
  02_TEMPLATE/WHS Calendar.xlsx
- **Excel legal and other requirements register: laws, regulations, codes, standards and licences, how each applies, who is responsible, how it is met and the review date, with review status flags and Australian examples**
  02_TEMPLATE/Legal and Other Requirements Register.xlsx
- **First 90 Days Plan: weeks 1 to 2 learn the business, weeks 3 to 6 the risk profile and gaps, weeks 7 to 12 priorities and quick wins, with who to meet, what to read, what to look at on site, questions to ask, and the day 90 report**
  02_TEMPLATE/First 90 Days Plan.docx and .pdf
- **Key contacts and responsibilities sheet: emergency and urgent contacts, the regulator, insurer and EAP, first aiders, wardens and HSRs, managers and their responsibilities, contractors, and who does what**
  02_TEMPLATE/Key Contacts and Responsibilities.docx and .pdf
- **Gap assessment checklist: a quick health check of the safety system against eleven elements, from policy and risk to audits and review, with a summary and priority actions**
  02_TEMPLATE/Gap Assessment Checklist.docx and .pdf
- **How to Use This Kit: how to complete and adapt it, the law in brief with Australia as the worked example, records and every placeholder**
  01_START_HERE/How to Use This Kit.pdf
- **Guide for New Safety Officers: the role (advising, not owning the risk), influence without authority, prioritising by risk, working with HSRs, reporting, and a worked example of the first 90 days**
  01_START_HERE/Guide for New Safety Officers.pdf
- **Read Me First, Product Overview, Permitted Use Terms and Version Information**
  01_START_HERE/ (PDF)

Formats

- Word (.docx), editable, with your logo and business name in the header
- Excel (.xlsx), editable, with dropdowns and formulas (no macros)
- PDF copies of the Word documents, for printing blank
- Delivered as a single ZIP download

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