

Procedures and Job Aids. What is the Difference?

PROCEDURE : a step-by-step sequence of activities or course of action that must be followed in the same sequence to correctly perform a task. *Examples may include documented Work Instructions, Site Operating Procedures, Emergency Procedures, Maintenance Procedures etc.*

Procedures are typically defined as “instructions for how to perform tasks.” These will cover a range of activities, including operations, maintenance, emergency response, and support function tasks, some of which may be safety-critical.

Procedures can also be used to train and support personnel to perform tasks correctly and to mitigate risk, particularly in relation to human failure.

There are different types of procedures, which vary in their format and level of detail. The appropriate format depends on several factors, but typically a step-by-step procedure will be required if:

- a) The task is safety critical
- b) The task is complex and requires very clear instructions;
- c) The task is rarely performed;
- d) Personnel involved are inexperienced.

Procedures may also be developed and used where there is a specific need to comply with standards, reduce the chances of something going wrong or if there is a clear improvement goal in mind.

Justifying the requirement for a Step-by-Step Procedure as opposed to a Job Aid is typically based on task characteristics, as illustrated here:

TASK CRITICALITY		LOW			MEDIUM			HIGH		
TASK FAMILIARITY		FREQ	INFREQ	RARE	FREQ	INFREQ	RARE	FREQ	INFREQ	RARE
TASK COMPLEXITY	LOW									
	MED									
	HIGH									

	No Written Instruction Required		Job Aid Required		Step-by-Step Procedure Required
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This figure is taken from a presentation on the UK HSE website entitled 'Putting it All Together'.

Always use a detailed written procedure where:

- The task involves infrequent or novel actions;
- Unpredictable events may occur and the actions required are likely to deviate from any Job Aid content.

JOB AID : an instructional tool that enables quick recall, providing prompts or illustrative guidance to help perform the task. *Examples may include checklists, picture books, diagrams, flowcharts – even acronyms and mnemonic devices.*

Job Aids may be advantageous and reduce cognitive burden. They contain information that is not meant to be committed to memory. As such, some Job Aids are designed to be used without any additional information or training.

Job Aids should be made available to help prompt memory when completing a task, reducing the likelihood of errors such as lapses and mistakes.

Checklists are the most common Job Aids, providing a systematic check that all important elements have been considered and addressed at each step of the task.

They are particularly in requiring users to cross-check and verify that critical steps or sequences are completed.