

OpsPilot

Contractor Management — User Manual

Onboarding & Performance · OSHA PSM / ISO 45001 · AI Engineering Co-Pilot



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What this guide covers — what contractor management covers, the two paths the OpsPilot module runs, what to have ready, and the documents you receive.

Compliance-critical. Licence, insurance and competency verification must be based on sighted documentation and confirmed by a competent person. The OpsPilot output structures the pack; it does not replace that verification or the authorising signatures.

1. What is contractor management?

Contractor management is the discipline of bringing an outside workforce onto your site safely and keeping them performing — from verifying they are who they say they are and qualified to do the work, through to reviewing how they actually performed. It exists because contractor incidents are a major source of serious harm: the modern regulatory baseline (OSHA's PSM contractor element) was driven by exactly that history.

2. What the OpsPilot module does — two paths

Role	Responsibility
AI Coach (OpsPilot)	Runs two lifecycle paths. Path A — Onboarding builds a complete Contractor Induction & Compliance Pack. Path B — Performance Management runs periodic reviews of an active contract. It applies OSHA 1910.119(h), ISO 45001 §8.1.4, ISO 9001 §8.4, ISO 31000, ISO 19011 and IOGP Report 423.
Contract Owner / HSE (you)	Provide the contractor detail, the scope, the verification documents, the HSE systems and the performance data — and you hold the authorising accountability.

Path A — Onboarding

Pre-qualification, licence and insurance verification with sighted documentation, joint risk assessment, a bridging document where HSE systems differ, site induction and site-specific hazard briefing, full subcontractor-chain disclosure, a performance-KPI framework, stop-work authorisation, and a final three-signatory authorisation to commence work.

Path B — Performance Management

- B1 — routine quarterly review.

- B2 — event-triggered (post-incident, audit, or regulator notice).
- B3 — renewal / reverification (insurance or licence expiry).
- B4 — contract closeout / offboarding.

3. What you will be asked — have this ready

- Path A: the contractor, the scope of work, their licences and insurance, their HSE management system, and the full subcontractor chain.
- Path B: the active contract, the performance data, and which review applies (routine, event-triggered, renewal, or closeout).

4. What you receive — the output

Path A produces a complete Contractor Induction & Compliance Pack (Word); Path B produces a contractor performance review (Word) appropriate to the trigger. Both are structured for competent review and the required authorising signatures.

5. Worked example (illustrative)

Onboarding a mechanical contractor for a shutdown. Pre-qualification confirms capability; licence and insurance are verified against sighted copies, not a claim on a form. A joint risk assessment covers their scope. Because their lock-out/tag-out procedure differs from the site's, a bridging document records exactly which rules apply where the two systems meet — the gap that causes incidents if left unmanaged. The subcontractor chain is fully disclosed (the second-tier welding sub is on site under the same controls), KPIs and stop-work authority are set, and three signatories authorise the start. Later, a B2 event-triggered review after a near miss reopens the pack rather than starting from scratch.

6. Getting the best result

- **Sight the documents.** Verify licences and insurance against real copies — never a claim on a form.
- **Bridge the HSE gaps.** Where the contractor's system differs from yours, the bridging document is where incidents are prevented.
- **Disclose the whole chain.** Subcontractors you don't know about are subcontractors you can't control.
- **Set KPIs and stop-work up front.** Performance expectations and the right to stop unsafe work belong in the pack, not in hindsight.

OpsPilot — AI Engineering Co-Pilot. Learn more at opsinnovatech.com