LEGENDARY CONSTRUCTION

HR Bible

People, safety and field operations



MANAGEMENT ADOPTION DRAFT | Federal baseline and Texas supplement

Commercial only | Multi-state operating framework | November 2026

How to adopt and use this manual

DOCUMENT CONTROL AND SCOPE

This manual is designed for the operating scale supplied by the user: a $10 million commercial-only roofing business, working across states, with an average project around $2 million. These are planning assumptions, not audited revenue, bonding capacity or verified past-performance claims.

What this edition does

It provides proposed employee policies, supervisor procedures, project controls and reusable forms. The word “must” states the proposed company rule unless a cited legal requirement is identified. The manual becomes company policy only after authorized adoption, completion of the decision fields and distribution to affected workers. Site plans and qualified-person designs remain necessary.

Required management decisions

Decision	Complete before rollout
Legal employer and signatory	Confirm LLC identity, authority, current status and any DBA.
Named contacts	Assign HR, alternate complaint contact, safety lead, payroll, records custodian and emergency backup.
Employment terms	Approve workweek, payday, benefits/PTO, travel reimbursement and discipline procedures.
State coverage	List every work state; complete a state addendum and site-specific plan before deployment.
Testing program	Approve lawful testing events, provider, review procedure and access permissions.
Document control	Set effective date, owner, review date and translation needs.

Known entity issue: The matching Texas record reviewed November 19, 2026 shows INACTIVE and FRANCHISE TAX INVOLUNTARILY ENDED. Resolve and document the status before relying on this manual as part of a new contract or procurement submission. See S36. No current insurance, safety statistics or certifications are established by this document.

Adopted by / title / effective date / next review date

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The ten requested onboarding records

Required company record	Where it is addressed
OSHA safety orientation acknowledgment	Pages 8, 19 and form F02 on page 38
Fall protection training documentation	Pages 19, 22 and form F03 on page 39
PPE acknowledgment	Page 21 and form F04 on page 40
Ladder safety acknowledgment	Pages 19, 23 and form F02
Heat illness prevention acknowledgment	Pages 19, 26 and form F02
Equipment and power-tool acknowledgment	Pages 19, 23 and form F02
Injury and accident reporting procedures	Page 28 and form F07 on page 43
Drug and alcohol acknowledgment	Page 17 and form F05 on page 41
Emergency response procedures	Page 27 and form F08 on page 44
Employee safety handbook acknowledgment	Pages 8, 13 and form F02

Acknowledgments record receipt and instruction. They are not proof of practical competence, a substitute for task-specific training, an OSHA certification, or a waiver of employee rights.

Organization and accountability

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Owner / operations director | Proposed policy upon formal adoption

Staffing model

Appoint an accountable operations lead, project manager, superintendent, safety lead, HR administrator, payroll controller and quality lead. One person may perform several functions only when competent, available and formally appointed. Maintain a backup for every critical role; the safety lead needs direct access to the owner.

Project staffing rule

Before accepting a project, build a labor plan from quantities, production assumptions, work hours, shift limits and schedule constraints. Show supervisors, trained installers, helpers, qualified operators and relief coverage. Record concurrent commitments and recruiting lead time. A $2 million job value alone does not establish a safe crew size.

Separation of duties

- The hiring approver authorizes the position; HR verifies onboarding; the supervisor releases the employee to defined tasks.
- The time approver verifies field records; payroll computes pay; an independent approver reviews payment changes.
- The project manager approves scope; the quality lead verifies acceptance; finance checks billing support.
- The competent person has authority to correct hazards promptly. A job title or OSHA course card alone does not establish competence for every task.

Management evidence

Maintain an organization chart, role descriptions, signed appointments, contact tree, capacity plan and current delegated-authority register. Review them whenever a project starts or a responsible person changes.

Written authority and group chats

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Owner / HR / project manager | Proposed policy upon formal adoption

Company representation

No person receives authority merely by joining a chat, making an introduction, recruiting a worker or offering advice. Use form F06 to identify the legal entity, representative, specific powers, financial limits, expiration and revocation. The appointing officer must have authority under the company governing documents.

Approval boundaries

- Hiring, pay changes, termination and drug-testing orders require the designated HR or officer approval.
- Bids, contracts, change orders, purchases and payment commitments require the appropriate dollar-limit approval.
- Outside advisors cannot represent themselves as officers, give site instructions or receive personnel files without a documented assignment.
- Subdelegation is prohibited unless expressly authorized. Emergency stop-work and calls for emergency help do not require purchasing authority.

Chat administration

Assign an owner to each channel. List members, employers, roles and purpose. Separate operational scheduling from HR and sensitive records. Confirm significant decisions in the approved project or HR system with date, approver and scope; do not rely on disappearing messages.

Offboarding and breach response

Remove access when an assignment ends, notify affected parties of revoked authority and preserve required records. If someone acts without authority, stop the transaction, preserve evidence, inform the officer and assess needed customer, insurer or counsel involvement. Do not quietly backdate an authorization.

Entering a new state

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Operations / payroll / counsel / broker | Proposed policy upon formal adoption

No automatic nationwide clearance

The exact operating states were not provided. This manual supplies a federal baseline, a Texas supplement and a repeatable state-entry process. It does not claim all 50 state rules have been completed. A Texas entity registration or policy does not establish permission to work elsewhere.

Pre-entry review

- Entity qualification, registered agent, contractor or roofing licenses, local registration, permits and public-project eligibility.
- Workers' compensation coverage in the work state, employer liability, commercial auto, liability and umbrella policy territory and exclusions.
- Payroll withholding, unemployment accounts, wage notices, local minimum wage, daily overtime, breaks, paid sick leave, travel and expense rules.
- Drug/cannabis testing restrictions, background-check timing, privacy and biometric requirements.
- State OSHA plan, heat rules, training mandates, required posters, leave, final-pay deadlines and lien/payment procedures.

Required approval

Complete F09 for each state and update it when the job location changes. Payroll, safety, the broker and a responsible legal reviewer must resolve their assigned items. Record links, effective dates and reviewer names. A blank or pending entry is not an approval.

Contract and client overlay

Check collective bargaining agreements, project labor agreements, owner security requirements and GC flow-down provisions separately. Resolve conflicts before dispatch. Apply lawful employee protections and project requirements; do not assume the "strictest" wording is always legally compatible.

Reference: S16. See the source register.

Recruiting and hiring

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: HR / hiring manager | Proposed policy upon formal adoption

Fair recruiting

Use a written job description with essential duties, physical demands, travel expectations, supervisor, location and approved pay range. Recruit based on job-related qualifications. Do not promise benefits, permanent hours, independent-contractor status or a start date outside your authority.

Screening workflow

- Approve requisition and budget; document interviews using consistent questions.
- Verify relevant skills and credentials directly; distinguish manufacturer training, OSHA Outreach cards and actual job competency.
- When using a consumer-reporting agency, provide the required standalone disclosure and obtain written authorization. Follow required pre-adverse and adverse-action steps and state fair-chance rules.
- Route medical or accommodation issues to HR at the appropriate stage; do not ask applicants for diagnoses in a group chat.

Written offer

The offer identifies the employer, title, location, pay basis, workweek, travel terms, contingent conditions and who can change the terms. HR checks state restrictions before using at-will or probation language. A trial period does not waive wage, safety or discrimination protections.

Classification and age controls

Do not use a W-9 or a subcontract label to decide worker status. Review the actual relationship under applicable federal and state tests. Company policy is to assign only adults age 18 or older to roofing and hazardous construction work. Reassess any office or nonhazardous youth role separately before hiring.

Reference: S24-S25. See the source register.

Onboarding from offer to deployment

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: HR / superintendent | Proposed policy upon formal adoption

Before the first shift

Use F01 to open the employee record, confirm employer and pay terms, arrange employment-eligibility completion, collect emergency contact details securely and schedule paid orientation. Provide the handbook, complaint contacts, timekeeping instructions, travel terms and applicable state notices in a language the worker understands.

The ten-record safety package

- Document OSHA/general safety orientation; fall-protection instruction and practical competency; PPE issue and use; ladder safety; heat prevention; equipment and power-tool safety.
- Explain injury and near-miss reporting; provide the drug/alcohol policy; review emergency response; obtain employee safety handbook receipt.
- Use F02 for topic-specific acknowledgments, F03 for fall training and F04 for PPE. Drug policy receipt is F05; any testing consent must be a separate, legally reviewed provider form.

Supervisor release

Complete site induction, task assignment, access clearance, inspection of assigned equipment and verification of applicable training. Record restrictions or pending items without disclosing medical details. Do not release someone to roof work because they signed forms or arrived wearing a vest. Assign a trained mentor to inexperienced workers.

First week and first month

Review pay accuracy, time capture, job understanding and safety observations after the first week. At 30 days, document the worker’s skills, training gaps, supervisor feedback and any pay or role change approved by HR. Retrain when work, equipment or demonstrated understanding changes.

Reference: S01, S04, S18. See the source register.

Employment eligibility and worker identity

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: HR / records custodian | Proposed policy upon formal adoption

I-9 process

Use the current official Form I-9 and instructions. The employee completes Section 1 no later than the first day of work for pay; complete employer verification within three business days of the first day, subject to applicable special rules. Use only an authorized examination procedure. Employees choose acceptable documents; do not demand a specific document or extra documents because of citizenship or origin.

Secure verification

Assign trained verifiers and a backup. Record corrections transparently; never backdate. Track reverification only where required. Apply E-Verify when legally or contractually required and follow its procedures, including employee protections when a mismatch occurs. A work badge does not replace employment verification.

No casual redistribution

Do not send identity documents, Social Security numbers, I-9 files, bank details or worker photos to a GC, recruiter or partner through group chat. Confirm the lawful purpose and minimum necessary information, obtain required authorization and use a controlled channel. Provide status confirmation instead of raw records when sufficient.

Retention and access

Keep I-9 records for the full employment period and, after separation, for three years after hire or one year after employment ends, whichever is later. Store them separately from routine supervisor files. Apply legal holds and other applicable retention requirements. Log external disclosures and promptly revoke access when a reviewer’s task ends.

Reference: S23. See the source register.

Pay and timekeeping

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Payroll controller / superintendent | Proposed policy upon formal adoption

Pay policy

Pay employees for all compensable time and meet the highest applicable lawful wage obligations for the job. Record actual work by employee, date, project, state and activity. Nonexempt employees receive federal overtime after 40 hours in the fixed seven-day workweek; payroll checks additional state rules. Do not average two weeks or replace private-sector overtime with informal “comp time.”

Daily time workflow

- Workers record work, required meetings and training, travel between sites and interrupted meals. Supervisors verify the record without removing worked time.
- Payroll resolves missing punches using reliable evidence, records edits and provides a correction route. A missed signature does not justify withholding earned pay.
- Unauthorized overtime must still be paid when worked; address authorization separately through lawful discipline.
- Determine the regular rate, including applicable bonuses and multiple rates. Day rates, salary labels and piece rates do not by themselves eliminate overtime.

Deductions and releases

Payroll reviews deductions for tools, damage, lodging, uniforms or advances before use. Written consent alone does not make a deduction lawful. Do not condition wages on signing a liability release, returning equipment or waiving a complaint.

Decisions to complete

Workweek start: _____. Payday: _____. Payroll contact and alternate: _____. Approver: _____. Provide these terms in the approved offer and applicable notices; review pay compliance before every new-state mobilization.

Reference: S18-S19. See the source register.

Travel and temporary assignments

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Operations / payroll / HR | Proposed policy upon formal adoption

Written assignment terms

Before dispatch, issue the work location, expected duration, reporting point, transportation, lodging arrangements, reimbursement rules, emergency contact and return-travel plan. Describe any per diem separately from wages. Do not assume a per diem automatically satisfies minimum wage, overtime or reimbursement obligations.

Travel time decisions

Ordinary home-to-work commuting is generally treated differently from required travel between sites, travel after required shop duties, special one-day assignments and overnight travel. Payroll must classify the facts under federal and state law. Track driver/passenger status and travel hours; do not use a blanket “travel is unpaid” rule.

Crew lodging and conduct

- Use safe, approved lodging and a documented occupancy plan. Employees have a route to report harassment, sanitation or security problems without using the alleged wrongdoer as gatekeeper.
- Do not retain passports, identity documents or bank cards. Do not use recruitment debts or threats to compel workers to remain.
- Record expense receipts and resolve reimbursements promptly. Disclose proposed charges in advance and review legality before deduction.
- Plan rest after long travel and avoid fatigued driving or roof work. No worker should drive while impaired or medically unsafe.

Changes and early returns

The project manager documents extensions, cancellations and transfers. HR reviews the effect on wages, benefits, leave and employee obligations. A client schedule change does not authorize withholding pay or abandoning workers without the agreed return arrangements.

Reference: S19. See the source register.

Public work and certified payroll

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Payroll / contracts administrator | Proposed policy upon formal adoption

Applicability review

Before pricing a public or federally assisted project, identify funding, contract clauses and the applicable wage determination. Federal Davis-Bacon generally covers specified federal construction contracts over $2,000; related laws can cover federally assisted work. State prevailing-wage and project labor requirements are separate. The project’s $2 million size alone does not determine the correct wage schedule.

Setup before mobilization

- Obtain the correct decision and modification, labor classifications, fringe obligations and any conformance process for unlisted work.
- Confirm the actual duties of each worker, apprentice registration and applicable ratios; a helper title does not justify a lower classification.
- Set payroll codes by job and classification. Track split work accurately and verify fringe credits with support.
- Include subcontractor flow-down requirements and assign review responsibility.

Weekly control

Where required, pay covered workers weekly and submit certified payroll with the signed statement of compliance. Protect worker identifiers in transmitted payroll. Reconcile hours to time sheets, classifications to actual tasks and payments to payroll records. Correct errors promptly and preserve the trail; do not ask workers to sign false receipts.

Site and closeout records

Post required wage information, retain project payroll and supporting records for the applicable period, and make records available through authorized channels. The contract administrator checks current agency instructions and any litigation-related changes before each project starts.

Reference: S21-S22. See the source register.

Employee conduct and handbook rules

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: HR / all supervisors | Proposed policy upon formal adoption

Expected conduct

Work safely, follow authorized instructions, protect customer property, report hazards and treat coworkers and visitors with respect. Prohibit threats, violence, theft, falsification, discriminatory harassment, impairment at work and deliberate bypass of safety controls. Attendance issues must be evaluated for protected leave or accommodation before discipline.

Work boundaries

Do not perform unauthorized roof work, use company labor or materials for side jobs, promise price changes, enter restricted customer areas or operate equipment without authorization. Report damage immediately. Do not conceal mistakes or repair customer property outside the approved scope.

Reporting and protected rights

Employees may report concerns to their supervisor, HR or the designated alternate. They may also contact government agencies without company permission. Nothing in this manual prohibits lawful discussions of wages, hours, safety or working conditions, protected concerted activity, union activity or protected whistleblowing. Confidentiality rules protect entrusted records; they are not a blanket wage-secrecy rule.

Acknowledgment

Provide the handbook and safety rules before deployment, allow questions and obtain F02 receipt. Use translated material or an interpreter when needed. Acknowledgment does not waive claims, create a fixed employment term, authorize medical disclosure or promise that progressive discipline will always apply. Any at-will clause must be separately reviewed for the applicable state.

Reference: S26, S29. See the source register.

Complaints and impartial investigations

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: HR / independent alternate | Proposed policy upon formal adoption

Accessible reporting

Employees can report harassment, discrimination, wage errors, safety concerns, threats or retaliation orally or in writing. Name an alternate outside the normal reporting line. If an owner or HR representative is involved, assign an independent investigator. Provide language assistance and avoid promises of absolute secrecy.

Response procedure

- Acknowledge the report promptly; assess immediate safety and preserve relevant messages, records and video.
- Consider interim measures that do not automatically disadvantage the complainant. Do not presume guilt or treat reassignment as punishment.
- Interview the reporting person, respondent and relevant witnesses; record facts and distinguish observation from inference.
- Review evidence fairly, document the conclusion and take proportionate corrective action. Follow up for retaliation and recurrence.

Confidential handling

Limit case details to people who need them to investigate or act. Do not impose blanket rules that prohibit protected discussions. Store investigation records separately from ordinary supervisor files. Notify participants of outcomes to the extent appropriate without unnecessary disclosure of another person’s medical or disciplinary record.

Supervisor obligations

Forward concerns to HR the same shift when practical, and immediately for imminent danger. Do not promise off-record handling, conduct a group-chat vote, threaten a worker for reporting, or make final legal judgments. Preserve union-representation rights in covered investigatory interviews.

Reference: S26, S29. See the source register.

Accommodations and fitness for work

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: HR / qualified medical provider | Proposed policy upon formal adoption

Individual assessment

Provide a route to request disability, pregnancy-related or religious accommodations without requiring legal terminology. Start a timely, interactive discussion about the limitation, essential job functions and possible adjustments. Do not automatically remove a worker because of pregnancy, a diagnosis or a prescribed medication.

Possible adjustments

Consider revised schedules, additional breaks, appropriate PPE sizes, equipment changes, temporary task changes, accessible reporting methods or leave, subject to the applicable legal standard. Assess roof hazards and essential duties with the safety lead while sharing only necessary restrictions. Do not promise an accommodation that would leave hazards uncontrolled.

Medical information boundaries

HR seeks only documentation permitted and necessary for the decision. Keep diagnoses, examinations and prescription information in restricted medical records. Supervisors receive work restrictions and emergency information only to the extent needed. Avoid broad “100 percent healed” or “no medications” rules.

Lactation and return to work

Arrange lawful pumping breaks and a private appropriate space, and check federal and state requirements. A dirty roof corner or bathroom is not an acceptable company solution. For return to work, obtain role-specific restrictions where lawful, evaluate available safe duties and coordinate leave and workers’ compensation without retaliation.

Written result

Record the request, discussion, effective accommodation, implementation owner and review date. Explain denial or alternatives appropriately and provide an escalation route. Keep benefit or leave determinations separate from generalized assumptions about ability.

Reference: S25, S27-S28. See the source register.

Leave and benefit administration

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: HR / benefits administrator | Proposed policy upon formal adoption

Eligibility is not revenue-based

A $10 million company does not automatically meet every employment-law threshold. Track actual headcount, related entities and work locations. Federal discrimination laws commonly begin at 15 employees, with age-discrimination coverage generally at 20. State laws can apply below those levels.

FMLA review

For private employers, federal FMLA generally requires 50 employees in at least 20 workweeks in the current or prior year. Employee eligibility generally includes 12 months of service, 1,250 hours in the prior 12 months and 50 employees within 75 miles. HR evaluates special worksite rules for traveling staff and checks state leave separately.

Benefits controls

Have the benefits administrator evaluate ACA applicable-large-employer status using full-time equivalents and aggregation rules; the general threshold is an average of at least 50 full-time employees including equivalents in the prior year. Review health continuation, retirement-plan duties and required notices with the plan administrator. Do not promise a benefit that has not been approved.

Company leave schedule

Approve PTO accrual, carryover, use, payout and holidays in a state-compatible addendum. Identify statutory sick leave, military leave, jury service and other protected absences. Employees should notify HR as soon as practicable; emergencies may prevent advance notice. Managers cannot automatically classify protected absences as misconduct.

Administration

Maintain a confidential leave ledger, send required notices, track deadlines and protect benefit information. Before denying leave or ending employment for exhaustion, review accommodation duties and applicable state protections.

Reference: S20, S25, S30. See the source register.

Drug and alcohol policy

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: HR / designated testing administrator | Proposed policy upon formal adoption

Safety expectation

Employees must not work while impaired by alcohol, illegal drugs or any substance that prevents safe performance. Supervisors report observable behavior, not diagnoses. Remove a person from hazardous work when immediate safety requires it and arrange safe transport; do not permit an impaired person to drive.

Testing program

Management must adopt a state-reviewed testing schedule before use. Specify covered positions, pre-employment or other permitted events, reasonable-suspicion criteria, any lawful random process, post-incident rationale, refusal procedures and review rights. A DOT-regulated driver program must follow the applicable DOT rules separately.

Fair testing procedure

- Use an approved provider, documented identity checks and chain of custody. Route confirmation and medical explanations through a qualified reviewer.
- Give required notices and obtain the separate consent/release required by the applicable program. F05 records policy receipt only.
- Offer the applicable result-review or retest process before final action. Apply consistent decisions and accommodation review where required.
- Do not use testing as punishment for reporting injury. For incident investigations, consider everyone whose conduct could have contributed, not only the injured reporter.

Confidentiality and decisions

HR stores results separately from ordinary personnel files and group chats. A supervisor normally receives only cleared, not cleared or relevant restrictions. Do not treat lawful medication use as automatically disqualifying or assume a positive screen proves impairment at the incident time. HR and counsel review any discipline against state law and the adopted policy.

Reference: S15, S28, S31-S32. See the source register.

Confidential records and data access

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Records custodian / HR | Proposed policy upon formal adoption

Separate record classes

Maintain distinct access for routine personnel records, payroll and bank data, I-9 records, confidential medical/testing files, investigations and public project records. Use role-based permissions, strong authentication, approved storage and a named custodian. Record who can grant, change or revoke access.

Sharing standard

Verify purpose, identity, authority and minimum necessary data before release. Use a secure transfer method and time-limited access where practical. A GC request is not itself permission to disclose raw test results, medical files or identity documents. Obtain applicable consent and protect legally required employee access rights.

Communications and photos

- Keep general chats limited to scheduling and operational information. Move HR issues to the designated confidential channel.
- Do not forward screenshots containing personnel records, post worker IDs or use employee photos for marketing without appropriate permission.
- Do not upload confidential employee or client material into unapproved AI tools or personal cloud accounts.
- Customer photos, security layouts and access credentials require approved handling; sensitive sites may prohibit photography entirely.

Incident response

Report a suspected leak promptly to the custodian. Restrict further access, preserve evidence and logs, identify affected data and recipients, and involve counsel to determine applicable notices. Do not delete evidence or ask recipients to conceal the incident.

Protected activity

This policy does not restrict lawful discussions of a worker’s own wages, hours or working conditions, reporting to agencies, or other protected activity. It limits improper access to or disclosure of entrusted confidential records.

Reference: S28-S29, S32. See the source register.

Training and qualification register

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Safety lead / superintendent | Proposed policy upon formal adoption

Training system

Maintain a register by employee and task showing course or instruction, trainer, date, practical demonstration, restrictions, retraining trigger and evidence location. Teach in a language and vocabulary the worker understands. Pay for required training time. Use a practical check before assigning hazardous work.

Required company onboarding topics

The register must cover the ten items requested by management: general OSHA/site orientation; fall protection; PPE; ladders; heat; equipment and power tools; injury reporting; drug/alcohol policy; emergency response; and the employee safety handbook. F02 records each topic and F03 separately documents fall training.

Task authorizations

- Record authorized operators for lifts, forklifts and specialized equipment, and the particular equipment or class covered.
- Identify competent and qualified persons for the hazards they actually manage. Verify rescue capability and first-aid resources.
- Check manufacturer requirements for membrane welding, adhesives, hot work and warranty eligibility.
- Reassess after a new task, equipment change, incident, observed unsafe practice or lapse in demonstrated understanding.

No generic certification claim

An OSHA 10- or 30-hour Outreach card is not an OSHA license and does not replace required job-specific instruction. Do not label all workers “OSHA certified” based only on orientation forms. Preserve fall-training certification details required by the applicable standard.

Training evidence

Use signed attendance, materials/version, assessment results and instructor qualifications. A worker who cannot demonstrate safe use remains restricted until trained and reassessed; a busy schedule is not a waiver.

Reference: S04, S18. See the source register.

Project mobilization and release

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Project manager / superintendent | Proposed policy upon formal adoption

Before labor arrives

Review the signed scope, exclusions, drawings, schedule, site rules, access restrictions and permits. Confirm legal entity readiness, state clearance, insurance, subcontractor approvals, payment terms and material availability. Verify that no one has committed capacity already assigned to another project.

Site hazard review

Inspect roof structure and deck condition, edges, skylights, openings, electrical lines, access routes and material-loading areas. Obtain existing-roof information and hazardous-material assessments when needed. Coordinate occupied-building protection, air intakes, fire alarms, public access and other trades.

Release checklist

- Name superintendent, safety lead, competent persons, first-aid resources and emergency backup.
- Approve the site-specific safety plan, fall/rescue plan, weather controls, JHA and equipment inspections.
- Confirm crew roster, employment clearance, training, PPE and task authorizations without exposing restricted medical data.
- Complete GC orientation and badging, establish staging and waste routes, and post emergency and reporting instructions.

Daily start and close

Conduct a brief pre-task meeting at shift start and after material changes. Confirm weather, work area, other trades and emergency access. At close, document temporary dry-in, drain status, loose materials, barricades and shutdown of hot work and equipment. The supervisor records unresolved risks and the next-shift handoff.

Stop condition

Any unresolved critical hazard, missing required protection, blocked rescue arrangement or unauthorized scope keeps the affected work on hold. Record correction and authorized restart; do not substitute a signature for a field check.

PPE and first-day gear

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Safety lead / purchasing / supervisor | Proposed policy upon formal adoption

Corrected first-day guidance

The supplied infographic establishes a recognizable arrival message, but price and color do not establish protection. A white hard hat may be a site convention; it must still be suitable and properly fitted. Long work pants may be acceptable when compatible with the task. Footwear selection depends on slip, puncture, impact, electrical and chemical hazards; “regular or steel toe is fine” is not a universal rule.

Company issue and inspection

The employer generally pays for PPE required by OSHA, subject to specific exceptions such as certain ordinary clothing and non-specialty footwear. Do not require employees to buy hard hats or fall protection as a condition of starting. The company remains responsible for the adequacy of employee-owned PPE. Record fit, condition, instruction and replacements on F04.

Arrival and task equipment

- Arrive in suitable work clothing and approved footwear, with the reporting location and supervisor details. Report any missing gear before work.
- Company/site issue may include approved head protection, high-visibility clothing, eye/face protection, task gloves, hearing protection and required fall equipment.
- Respirators require the applicable program, medical evaluation, fit testing and training; a dust mask is not a substitute for evaluation.
- The supervisor checks additional burn, chemical, electrical and weather protection for the actual task.

Remove unsupported shopping claims

This manual does not repeat the $10 hard-hat/boot prices or unverified Home Depot discount. Purchasing verifies supplier arrangements separately. Replace worn or damaged equipment promptly, and investigate repeated failures without pressuring workers to continue with defective PPE.

Reference: S01, S07. See the source register.

Roof access and fall protection

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Site competent person / safety lead | Proposed policy upon formal adoption

Assess before access

Determine roof strength and condition before allowing work. Map unprotected edges, openings, skylights, fragile surfaces, access and lower-level hazards. Federal construction rules generally require fall protection at unprotected edges six feet or more above lower levels, with task-specific provisions; state and project requirements may be more protective.

Select the system

Prefer appropriate conventional protection. A site-specific plan must identify the selected system, installation responsibility, inspection, work boundaries and rescue arrangements. Warning lines or safety monitoring are allowed only when the applicable roofing rule and conditions permit them; never treat a painted line as universal fall protection.

Personal fall equipment

Have a qualified person evaluate anchor suitability, system compatibility, fall clearance and swing-fall hazards where required. Workers inspect equipment before use and follow manufacturer instructions. Remove impacted or defective equipment from service. Do not use vents, pipes or convenient rooftop objects as unverified anchors.

Prompt rescue

Plan how a fallen worker will be reached and recovered promptly, who is trained, what equipment is available and how responders will access the roof. Coordinate outside rescue capabilities in advance. Calling 911 alone is not a complete site rescue plan. Do not attempt a rescue that creates additional unprotected victims.

Authorization record

F03 documents training and competency; F08 documents the site rescue arrangements. Reassess after layout, equipment, crew or weather changes. Prohibit unauthorized roof access and roof work outside the approved scope.

Reference: S02-S04. See the source register.

Ladders lifts and power tools

ACCOUNTABLE OWNER: Superintendent / equipment coordinator | Proposed policy upon formal adoption

Ladder controls

Choose the correct ladder and rating, inspect it, establish a stable base and protect it from traffic. Secure access ladders and provide the required extension or equivalent safe grasping provision at landings. Use the correct setup angle for a non-self-supporting ladder and follow manufacturer instructions. Face the ladder, keep a secure grip and move materials by a method that does not compromise climbing.

Lifts and powered access

Only trained, authorized personnel may operate the assigned lift or forklift. Check the inspection, ground conditions, overhead hazards, load limits, exclusion zones and applicable fall protection. Follow the equipment-specific requirements. A forklift is not a personnel lift unless the arrangement is designed and authorized for that purpose.

Power-tool procedure

- Verify guard, cord, battery, switch, blade or bit, rating and accessories before use. Remove damaged tools from service and tag them.
- Use the required eye, hand, hearing and other protection. Control dust, flying debris and nearby workers.
- Isolate energy before adjustment or servicing; authorized personnel handle electrical repairs and lockout procedures.
- Keep cords and hoses from creating trip or edge hazards. Use applicable electrical protection and avoid conductive equipment near energized sources.

Training record

F02 captures ladder and equipment/power-tool instruction and observed safe use. Record equipment-specific restrictions in the qualification register. A worker’s prior experience is useful evidence, but the supervisor still verifies safe use for the current site and equipment.

Reference: S05. See the source register.

Hot work asphalt and fire prevention

ACCOUNTABLE OWNER: Superintendent / fire-watch lead | Proposed policy upon formal adoption

Plan before ignition

Identify the specific process: hot asphalt, torch-applied membrane, welding, cutting or heat-producing equipment. Check building occupancy, combustible materials, concealed spaces, roof openings, air intakes and local fire requirements. Obtain the required owner/GC/fire permit and manufacturer instructions before work.

Permit and fire watch

The site hot-work authorization specifies location, task, equipment, responsible operator, fire-watch coverage, extinguishers, required monitoring and shutdown time. Set watch duration using the applicable code, permit, insurer and project requirements; do not invent a single nationwide duration. Verify protection below and beside the work.

Asphalt and fuel controls

- Train operators on kettle and equipment instructions, burn protection, safe transfer, hose condition and emergency shutoff.
- Secure fuel cylinders and containers, protect them from impact and maintain approved storage and separation.
- Prevent fumes from entering occupied areas and coordinate HVAC/intake controls with the authorized building representative.
- Keep access routes and drains protected. Never leave an active ignition source or kettle without the required attendance.

Stop and respond

Stop for leaks, unsafe wind, failed controls, smoke in occupied spaces, unauthorized activity or an unavailable fire watch. Alert the site lead and follow the emergency plan. Do not use water on a material or fire where the SDS or emergency procedure prohibits it.

Closeout evidence

Retain the permit, precheck, responsible personnel, monitoring record and final inspection. This page is a management procedure, not a substitute for process-specific training, applicable fire code or manufacturer instructions.

Chemicals dust and existing materials

ACCOUNTABLE OWNER: Safety lead / qualified assessor | Proposed policy upon formal adoption

Chemical program

Maintain a site chemical inventory, labels, accessible safety data sheets and worker instruction. Review primers, adhesives, solvents and asphalt products before use, including ventilation, ignition, glove and respirator needs. Coordinate nearby occupants and trades. Provide spill controls appropriate to the products and prohibit unapproved mixing.

Silica and dust

Before cutting or drilling concrete or masonry, evaluate silica exposure. Use the applicable Table 1 controls or exposure-assessment approach, a written exposure-control plan and a competent person when required. Plan dust collection, wet methods and housekeeping. Do not substitute a disposable mask for required engineering controls.

Existing roof hazards

Obtain available surveys for asbestos, lead and other hazardous materials before disturbing suspect material. If unexpected suspect material appears, stop the affected task, isolate the area and arrange qualified assessment. Do not claim a material is safe based only on appearance or the age of a building. Licensed specialists and notifications may be required.

Respiratory protection

When respirators are required, implement a written program with a qualified administrator, hazard-based selection, medical evaluation, fit testing where required, training and maintenance. Tight-fitting respirators must achieve the required seal. Evaluate voluntary use separately; do not collect medical questionnaires into general HR or supervisor chat.

Records

Keep assessments, controls, training and required surveillance/exposure records in the appropriate restricted system. Coordinate legally required employee access and applicable long retention periods.

Reference: S06-S09, S17. See the source register.

Heat weather and fatigue

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Site lead / safety lead | Proposed policy upon formal adoption

Heat program

Before the shift, assess environmental conditions, workload, direct sun, protective clothing and worker acclimatization. Provide accessible potable water, a cool rest area, planned breaks and a way to recognize distress. Gradually build exposure for new or returning workers. Use a buddy/check-in system and increase supervision when risk rises.

Weather decision

Document project-specific triggers and monitoring sources for heat, lightning, wind, rain, ice and visibility. Apply current state rules, equipment limits and roof-system instructions. Do not publish one universal temperature or wind speed for all jobs. The supervisor records a stop decision, temporary securement and the conditions required for restart.

Symptoms and emergency action

Workers must report dizziness, headache, unusual weakness, cramps or confusion promptly. Move an affected person to a safer cool area and initiate the emergency plan. Confusion, collapse or suspected heat stroke requires emergency medical response and immediate appropriate cooling by trained personnel; do not leave the worker alone.

Fatigue and work organization

Plan breaks and shift lengths around heat, strenuous tasks and travel. Rotate tasks where safe and schedule high-load work in lower-risk periods when practical. Do not penalize workers for using required breaks, reporting symptoms or stopping unsafe work.

Documentation

Use F02 for heat-prevention acknowledgment and F08 for response details. Log site conditions, water/rest arrangements and any changes to work. Current heat obligations must be checked for each state before the project begins.

Reference: S10-S11, S16. See the source register.

Emergency response and rescue

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Superintendent / emergency coordinator | Proposed policy upon formal adoption

Before work begins

Complete F08 with the site address/GPS, gate and roof access, emergency number, assembly point, clinic, first-aid resources, rescue method and responsible backups. Confirm communication coverage and responder access. Provide a means for workers to summon help even if the supervisor is unavailable.

Immediate response

- Stop affected operations and protect people from additional harm. Call emergency services when necessary.
- Send a designated person to guide responders and control vehicle/gate access. Account for workers at the assembly point.
- Only trained, equipped personnel provide first aid or rescue within their capability. Avoid moving an injured person unless necessary for immediate safety.
- Secure fuel, electricity or other hazards only when safe. Preserve the scene after rescue and notify the company incident lead.

Plan for roof-specific events

Address fall suspension, collapse, heat illness, burns, fire, severe weather, chemical exposure and medical emergencies. Preplan rescue equipment and trained personnel rather than relying on improvised ladders or an unverified assumption about fire-department capabilities.

Drills and supplies

Check supplies before mobilization and replenish them during the project. Verify first-aid capability and reasonable access to medical care. Run a site orientation and appropriate drills, including communication and headcount practice. Record lessons and changes; update when access or crew assignments change.

Customer coordination

Coordinate alarms, shutdowns and evacuation with the GC and occupied facility. Security restrictions must be addressed in advance so they do not block emergency entry.

Reference: S03, S12. See the source register.

Injury reporting and investigation

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Safety lead / HR / claims contact | Proposed policy upon formal adoption

Report without retaliation

Employees report injuries, illness, near misses, unsafe conditions and property damage as soon as practicable. Care takes priority over paperwork. Provide a reporting route outside the immediate supervisor. Do not discourage reporting through punishment, prizes lost solely for reporting, or automatic drug testing unrelated to a legitimate investigation.

First response and notices

The supervisor arranges care, controls hazards and promptly informs the safety lead and HR. The designated reporting owner evaluates OSHA and state notice duties immediately. Federal rules generally require reporting a work-related fatality within 8 hours and an in-patient hospitalization, amputation or eye loss within 24 hours, subject to the rule’s timing and scope conditions. Do not wait for an insurance decision.

Investigation

Use F07 to capture facts, witnesses, task, equipment, conditions and immediate controls. Preserve photographs and relevant documents lawfully. Identify underlying causes, not only worker behavior. Assign corrective actions, owners and due dates, and verify effectiveness before restart.

Recording and client communication

Evaluate OSHA recordability separately from workers’ compensation eligibility. Maintain required logs and annual/electronic submissions based on establishment size and industry. Provide the GC agreed incident notices while protecting private medical information. Use verified facts and avoid speculation or unnecessary admissions.

Restart

The safety lead documents control verification and an authorized restart. Communicate lessons without naming or shaming an injured worker or exposing confidential medical details.

Reference: S13-S15. See the source register.

Workers compensation and return to work

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: HR / broker / claims administrator | Proposed policy upon formal adoption

Coverage before deployment

Verify the actual employer, work states, covered classifications, policy dates, limits and endorsements with the broker. A certificate of insurance is a summary; confirm needed coverage and exclusions. Texas non-subscription is not a multi-state coverage strategy. Do not dispatch a crew assuming another subcontractor’s policy covers it.

Claim workflow

Provide prompt access to care and the applicable claim instructions. Notify the carrier and agencies as required, preserve records and track restrictions and appointments through HR. Do not discourage a claim, request a false injury date or make a worker sign away benefits to receive earned wages.

Safe return

Obtain job-relevant restrictions through the permitted process, compare them with essential duties and identify safe work if available. Give the supervisor necessary restrictions, not diagnoses. Document proposed duties, duration, hours and review dates. Coordinate disability accommodation, leave and workers’ compensation obligations.

Subcontractor coverage

Verify each subcontractor’s actual employer, coverage, state endorsements and renewal dates. Examine independent-contractor and temporary-worker arrangements for gaps. Contract language and indemnity clauses do not replace statutory duties or insurer confirmation.

Management controls

Track claim status, corrective action, restricted-duty availability and claim costs with appropriate access. Report safety metrics accurately and distinguish insured loss runs, OSHA records and experience modification rates; they measure different things.

Reference: S34-S35. See the source register.

Performance discipline and separation

ACCOUNTABLE OWNER: HR / authorized manager | Proposed policy upon formal adoption

Fair correction

Document the expected standard, observed facts, employee explanation and corrective action. Coach or retrain where appropriate. Serious hazards may require immediate removal from the task. Discipline must be consistent and reviewed for protected complaints, leave, disability, wage concerns and other legal protections.

Decision review

HR verifies the facts, comparators, prior notices, contractual rules and legal obligations before termination or major discipline. A customer’s request to remove a worker is not automatically a lawful reason to discharge them. Determine whether reassignment, investigation or accommodation review is appropriate.

Separation checklist

- Confirm voluntary/involuntary status, effective date, applicable final-pay deadline, approved leave/PTO payout and benefit notices.
- Pay earned wages on time even if equipment is missing. Handle lawful deductions or recovery separately.
- Revoke systems, keys, badges and authority; preserve records and legal holds.
- Arrange safe return travel under the assignment terms and document property return without coercive releases.

References and unemployment

Only authorized personnel provide employment references or unemployment responses. Use accurate, consistent records. Do not threaten to report immigration status or suppress a wage or safety complaint.

State review

Final-pay timing, deduction rules and required notices differ by state. For Texas employees, see the Texas supplement. HR must check the actual work state before processing a separation.

Reference: S29, S33. See the source register.

Subcontractors and labor partners

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Contracts / HR / safety lead | Proposed policy upon formal adoption

Prequalification

Before award, verify legal identity, W-9, state authorizations, insurance, scope, similar work, staffing, safety program and responsible supervisor. Review litigation/default questions honestly and obtain references with permission. Do not substitute a certificate folder for review of the actual work arrangement.

Written allocation

The subcontract defines work, exclusions, supervision, safety coordination, reporting, pay, schedule, equipment, materials, testing responsibility and confidentiality. Confirm who employs, directs, trains and pays each worker. Contract labels do not determine legal classification or eliminate joint-employer risks.

Worker protection

No labor broker may retain identity documents, charge prohibited recruitment fees, threaten workers, fabricate time records or promise unauthorized employment terms. Require workers to receive understandable pay and assignment terms. Escalate complaints directly to HR and stop coercive practices.

Site integration

Subcontractor workers complete required site orientation and demonstrate task qualifications. Coordinate hazards and emergency plans among employers. The GC’s safety rules do not remove Legendary’s obligations to its own employees. Record attendance and permitted access without indiscriminate sharing of confidential files.

Payment and closeout

Review verified progress, payroll evidence where required, lower-tier payments and legally appropriate lien waivers. Track insurance expiration and corrective actions. Resolve disputed invoices through contracts management without withholding employee wages or improperly threatening workers.

Vehicles equipment and secured sites

ACCOUNTABLE OWNER: Fleet coordinator / superintendent | Proposed policy upon formal adoption

Authorized drivers

Verify license, vehicle class, motor-vehicle record where lawful, insurance and task-specific training. Determine whether vehicle weight, interstate use or passenger/cargo operations trigger DOT, CDL, medical, inspection or hours-of-service duties. Do not assume a roofing truck is exempt because driving is incidental.

Daily operating rules

Inspect vehicles and trailers, secure loads, confirm tie-downs and towing ratings, and record defects. Require seat belts, safe backing procedures and distraction-free driving. Prohibit impaired or fatigued operation. Use trained spotters and exclusion zones when needed around workers and the public.

Equipment custody

Record assigned assets, authorized operators, preventive maintenance, inspections and removal from service. Secure fuel, batteries, blades and keys. Only trained personnel service equipment using appropriate energy-control procedures. Damage must be reported, not hidden to avoid a charge.

Security-sensitive customers

For correctional, healthcare, education, industrial or other secured sites, obtain the approved access and tool-control plan. Follow badging, escort, prohibited-item, photography and communication rules. Count tools when required and coordinate missing items promptly. The supplied roof photographs do not establish a named customer or government contract.

Incident handling

Call emergency services as needed, protect the scene and notify the designated fleet and safety contacts. Preserve inspection and trip records. HR controls medical information, and the authorized representative handles insurer/customer statements.

Records retention and legal holds

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Records custodian / HR / finance | Proposed policy upon formal adoption

Retention schedule

Approve a schedule by record type, legal basis, responsible owner, minimum retention, storage and disposal method. Apply longer state, contract, insurance or litigation periods where required. Never use a single short retention period for every record.

Baseline rules to incorporate

I-9 retention follows the later-of-three-years-after-hire or one-year-after-separation rule. OSHA logs generally have a five-year retention period under their specific rules. Exposure records and certain occupational medical records may require decades of retention, including 30-year or employment-plus-30-year periods with exceptions. HR must verify the applicable category rather than applying that period to every drug test.

Operational records

- Retain offers, acknowledgments, training evidence, time and payroll records, state notices, benefit records and employment decisions under the approved schedule.
- Preserve project contracts, insurance endorsements, permits, submittals, inspections, change orders, safety records and warranty files for the applicable periods.
- Keep access and disclosure logs for confidential records, and restrict copies in personal devices or chat exports.

Legal hold

When litigation, a claim, an investigation or a reasonably anticipated dispute arises, suspend ordinary destruction for relevant records. Notify custodians, preserve original messages and backups where appropriate, and document scope. Only the authorized legal hold owner releases the hold.

Controlled disposal

Verify the hold status, approve destruction, use secure disposal and record the action. Employees retain legally protected access rights; confidentiality does not justify refusing a lawful request.

Reference: S13, S17, S23. See the source register.

The jobsite binder

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Superintendent / document controller | Proposed policy upon formal adoption

Accessible operational file

Maintain a current paper or reliably accessible digital binder. Workers need access during an outage or when the office is closed. Label current revisions and remove obsolete instructions from active use. Keep confidential employee and medical records out of the common binder.

Binder contents

- Site address, emergency contacts, map, assembly point, responder access and rescue plan.
- Scope, current drawings, permits, superintendent and competent-person appointments, GC rules and approved work hours.
- Site safety plan, daily JHA, fall-protection setup, heat/weather plan and applicable hot-work permits.
- Roster showing authorized tasks, orientation completion and training status; no SSNs, diagnoses or test results.
- PPE issue/inspection status, equipment inspections, SDS inventory, required posters and wage determinations where applicable.
- Incident-reporting instructions, corrective-action log, daily reports, quality inspections and shutdown/dry-in checklist.

Daily maintenance

The superintendent verifies the binder at mobilization and after changes. Each shift confirms the roster, hazards, emergency access, weather and temporary protections. The document controller archives superseded documents and makes the current version clear.

Customer access

Provide the GC the agreed evidence package using authorized channels. Share status or redacted information where appropriate. Requests for confidential employee material go to HR; the field binder is not a public personnel file.

Management cadence and program audit

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: Owner / operations / HR / safety | Proposed policy upon formal adoption

Daily and weekly

Daily: verify staffing clearance, JHA, equipment, weather, time capture and dry-in. Weekly: review crew loading, payroll exceptions, safety observations, incidents, open corrective actions, submittals, change notices and material lead times. Use both leading indicators and actual outcomes; do not reward injury suppression.

Monthly controls

Review training gaps, expiring insurance/credentials, state registrations, subcontractor status, employee concerns, turnover, overtime/fatigue and unresolved payroll issues. Finance updates WIP, backlog, cost-to-complete and cash needs. Capacity decisions should reflect trained labor and working capital, not only sales targets.

Quarterly and annual

Quarterly, sample onboarding and site records and verify that signatures correspond to real instruction. Annually and after major changes, review policies, employment-law applicability, benefits thresholds, state addenda, insurance, emergency plans and retention schedules. A new law or state entry can require an earlier update.

Initial rollout plan

- First 7 days: assign owners, address legal-entity status, verify insurance and stop unsupported credential claims.
- By day 30: adopt approved policies, complete current-worker training/gap checks, set secure records access and launch forms.
- By day 60: audit payroll/travel and subcontractor files, run emergency drills and close high-risk gaps.
- By day 90: evaluate field use, update state files and issue a controlled revised edition.

Audit evidence

Each finding needs an owner, due date, corrective evidence and closure approval. Archive the review and report overdue critical actions directly to the owner.

Texas supplement

HR AND FIELD OPERATIONS

ACCOUNTABLE OWNER: HR / payroll / broker / counsel | Proposed policy upon formal adoption

Entity and local registration

The matching record for LEGENDARY CONSTRUCTION AND DESIGN LLC, taxpayer 32094810663 and SOS file 0805522085, listed Adrian Serrano as registered agent and showed inactive status on November 19, 2026. Confirm identity against the W-9 and formation documents and resolve status before representing the entity as active. City contractor registration and permits are separate.

Pay and separation

Texas final wages are generally due within six calendar days after involuntary separation and by the next regular payday after voluntary separation. Do not delay final pay for unreturned property. Written PTO and bonus terms affect what is owed; HR checks the specific facts and any other applicable jurisdiction.

Workers compensation

Texas private employers may be non-subscribers in many circumstances, but this is not a substitute for the coverage required by other states or project contracts. Government construction can require coverage. Non-subscribers have employee-notice and reporting obligations; verify these with the broker and Texas counsel before relying on that status.

Safety and testing

Federal OSHA generally covers private-sector Texas construction. Texas does not issue a statewide roofing license; RCAT credentials are voluntary. Use a clear written drug policy, separate appropriate consent, confidential handling and consistent review. The Texas approach cannot simply be exported to another state.

Incomplete state coverage

This is the only state supplement in this edition. HR must complete F09 and the corresponding policy addendum for every additional state before dispatch; list local wage, leave, testing, safety and final-pay rules with effective dates.

Reference: S16, S31-S36, S39. See the source register.

F01 New hire and deployment checklist

PRINTABLE FORM / HR AND SUPERVISOR RECORD

Employee name or internal ID / legal employer / role / supervisor

Start date / project / work state / orientation language

- ☐ Written offer, pay terms, workweek and payday provided.
- ☐ Employment eligibility process assigned and deadlines tracked.
- ☐ Applicable tax, payroll, emergency contact and state notices completed securely.
- ☐ Handbook and reporting contacts provided; required acknowledgments obtained.
- ☐ Task training and practical assessments complete; restrictions recorded.
- ☐ PPE selected, fitted, issued and inspected; equipment authorization verified.
- ☐ Site orientation, access/badge, JHA and emergency/rescue briefing complete.
- ☐ Travel, lodging and reimbursement terms communicated where applicable.

Pending items / prohibited tasks / responsible owner and deadline

HR clearance / date | Supervisor task release / date

Release only the tasks actually cleared. A payroll setup or signed receipt is not authorization to work on a roof. Do not include medical diagnoses, test results or identity-document copies on this form.

F02 Orientation and handbook record

PRINTABLE FORM / TEN REQUIRED ONBOARDING TOPICS

Employee name or ID / project / date / language or interpreter

Topic	Date / trainer	Worker initials
OSHA/general site safety orientation		
Fall protection - attach F03		
PPE selection/use - attach F04		
Ladder safety and demonstrated safe use		
Heat illness prevention and symptoms		
Equipment and power-tool safety		
Injury, accident and near-miss reporting		
Drug/alcohol policy receipt - attach F05		
Emergency response, assembly and rescue briefing		
Employee safety handbook receipt		

I received the listed policies/instruction, had an opportunity to ask questions and know how to report concerns. I will perform only authorized tasks and report missing training or equipment. My signature does not waive employee rights or establish competence for tasks I have not demonstrated.

Materials/version / practical demonstration completed / follow-up needed

Employee signature / date | Instructor signature / date

F03 Fall protection training record

PRINTABLE FORM / TRAINING CERTIFICATION AND TASK RELEASE

Employee identity / employer / training date or dates / project

Trainer name / relevant competence and qualification / language

- ☐ Roof/edge/opening hazards and task-specific protection explained.
- ☐ Selected system, limitations and work-area boundaries demonstrated.
- ☐ Equipment inspection, correct fit/use and removal-from-service rules demonstrated.
- ☐ Anchor/system suitability and clearance responsibilities explained.
- ☐ Access route, falling-object controls and prohibited actions reviewed.
- ☐ Site rescue procedure, communication and emergency response reviewed.

Equipment/system used / actual practical assessment and result

Restrictions / retraining needed / reassessment date

Trainer or employer certification signature / date

Employee acknowledgment / date | Supervisor task authorization / date

Maintain the current training certification. If relying on prior training, document when the employer determined its adequacy. This form is not a system design, anchor certification or blanket authorization for every roof.

F04 PPE issue and acknowledgment

PRINTABLE FORM / SELECTION FIT AND CARE

Employee / project / task / assessor / date

Item and specification	Issued / fit checked	Inspection or replacement
Head protection		
Eye/face protection		
Task gloves		
Footwear requirement		
Visibility / hearing protection		
Fall equipment / identification		
Other task protection		

- ☐ Task hazards, limitations and manufacturer instructions reviewed.
- ☐ Worker demonstrated proper fitting, inspection, use and storage.
- ☐ Company payment/issue responsibilities confirmed; no blanket employee-purchase requirement.
- ☐ Replacement and damaged-equipment reporting process explained.

Additional hazards / equipment restrictions / assigned follow-up

Employee acknowledgment / date | Assessor signature / date

Respirator clearance and medical records remain in the restricted program file. Do not attach medical questionnaires or diagnoses.

F05 Drug and alcohol policy receipt

PRINTABLE FORM / ACKNOWLEDGMENT ONLY

Employee / legal employer / policy version / effective date

I acknowledge receipt of the company drug and alcohol policy. The covered roles, prohibited conduct, authorized testing circumstances, reporting process and consequences were explained to me in a language I understand. I know how to raise a concern or request clarification.

- ☐ Testing administrator and confidential contact identified.
- ☐ State-specific notices and restrictions reviewed as applicable.
- ☐ Collection, confirmation and medical review process explained.
- ☐ Applicable dispute/retest and decision-review procedure explained.
- ☐ Safe transport and removal from hazardous tasks explained.
- ☐ Confidential handling and no general-chat disclosure explained.
- ☐ Injury reporting and non-retaliation protections explained.

This is not consent to a test or a broad medical release. Use the separate approved provider/state-specific authorization when required. This form does not waive rights, authorize unrestricted disclosure or prove that a worker is impaired.

Administrator contact / alternate / approved testing provider

Questions or follow-up requested - do not include medical information

Employee signature / date | HR acknowledgment / date

F06 Delegation of authority

PRINTABLE FORM / NAMED ROLE AND LIMITS

Legal entity / appointing officer and title / delegate and employer

Purpose / project / effective date / expiration date

- ☐ Hiring or pay decisions - scope stated below.
- ☐ Testing administration - scope stated below; restricted access separately approved.
- ☐ Purchases or financial commitments - dollar limit stated below.
- ☐ Bids, contracts or change orders - scope stated below.
- ☐ Site supervision or safety decisions - scope stated below.
- ☐ Advisory/recruiting role only - no other authority implied.

Exact authorized acts / dollar limits / prohibited acts

Systems or records permitted / confidentiality conditions / subdelegation

Revocation method / notice recipients / records location

Appointing officer signature / date | Delegate acceptance / date

Chat membership does not grant authority. This appointment cannot exceed the authority of the signer. Emergency reporting and stopping immediate unsafe work are not restricted by purchasing limits.

F07 Incident and corrective action

PRINTABLE FORM / FACTUAL REPORT - RESTRICT AS APPROPRIATE

Project / location / incident date and time / reporter / report time

Event type / affected person ID / task and equipment

Facts observed / conditions / witnesses - avoid diagnosis or blame

Immediate care and controls / emergency services / scene preservation

Reporting owner / OSHA-state-carrier-client evaluation / deadlines and completion

Corrective action	Owner / due date	Verified by / date

Restart authorization / remaining restrictions / follow-up date

Store medical details separately. Recordability, reportability and compensation eligibility are separate determinations. Do not delay care or reporting while completing this form.

F08 Site emergency and rescue plan

PRINTABLE FORM / COMPLETE BEFORE ROOF ACCESS

Project / street address or GPS / gate and roof access instructions

Emergency number / site coordinator and backup / communication method

Assembly point / headcount owner / responder guide / nearby care location

Fall rescue method / trained personnel / equipment / verified responder capability

Fire, heat, chemical and weather procedures / shutdown authority

- ☐ Routes and access checked; emergency services can enter.
- ☐ Required first-aid resources, communications and rescue equipment confirmed.
- ☐ Crew briefed; language needs addressed; drill or demonstration recorded.

Approver / date / drill date / next review or change trigger

Attach the site map and task-specific rescue details. Do not treat “call 911” as the entire fall-rescue procedure.

F09 State entry approval worksheet

PRINTABLE FORM / ONE PER STATE AND MATERIAL CHANGE

State / local jurisdiction / project / employer / proposed start

Review item	Evidence / date / reviewer
Entity qualification and registered agent	
Contractor/roofing/local registration and permits	
Workers compensation and policy territory	
Tax, unemployment and payroll registration	
Wage, overtime, breaks, expenses and pay notices	
Leave, benefits, final pay and deductions	
Testing, background, privacy and worker classification	
State OSHA, heat, training and posters	
Public work, union/PLA and client requirements	

Unresolved issue / owner / deadline / affected work held

HR / payroll / safety / broker / legal reviewer approvals and dates

Record official source links and effective dates in the state addendum. Blank or pending rows do not authorize mobilization. Recheck before a new project or a material rule change.

F10 Daily job hazard and release record

PRINTABLE FORM / SHIFT START AND CHANGE OF CONDITIONS

Project / date / shift / supervisor / competent person

Tasks / work area / crew / adjacent trades

Task and hazard	Control / responsible person
Roof edges, openings and access	
Lifts, loads, equipment and electrical	
Heat, weather, chemicals and hot work	
Public/customer protection and debris	

- ☐ Crew training and task authorization checked.
- ☐ PPE and equipment inspected; damaged items removed.
- ☐ Fall/rescue and emergency arrangements available.
- ☐ Weather and roof condition acceptable for assigned work.
- ☐ GC coordination, permits and restricted areas reviewed.

Changes / stop-work action / correction / authorized restart

Crew briefing signatures or attached roster / supervisor signature

End-of-shift dry-in / drains / securement / handoff issues

Source register 1

PRIMARY SOURCES AND REVIEW TRAIL

Sources reviewed for this edition. Links support the legal baseline; the detailed company workflows and forms are proposed operating controls. Confirm current requirements and site-specific applicability before adoption.

S01 OSHA PPE selection, fit and payment

S02 OSHA fall-protection duties

S03 OSHA fall systems and prompt rescue

S04 OSHA fall-hazard training certification

S05 OSHA portable ladder requirements

S06 OSHA silica in construction

S07 OSHA respiratory protection

S08 OSHA hazard communication

S09 OSHA asbestos in construction

S10 OSHA heat prevention and state standards

S11 OSHA water, rest and shade

S12 OSHA medical services and first aid

S13 OSHA recordkeeping

S14 OSHA serious incident reporting

Source register 2

PRIMARY SOURCES AND REVIEW TRAIL

Sources reviewed for this edition. Links support the legal baseline; the detailed company workflows and forms are proposed operating controls. Confirm current requirements and site-specific applicability before adoption.

S15 OSHA post-incident drug testing and retaliation

S16 OSHA State Plan directory

S17 OSHA exposure and medical record retention

S18 DOL construction wage and overtime rules

S19 DOL hours worked and travel

S20 DOL family and medical leave eligibility

S21 DOL Davis-Bacon overview

S22 DOL weekly certified payroll instructions

S23 USCIS Form I-9 instructions

S24 FTC and EEOC employment background checks

S25 EEOC employer coverage thresholds

S26 EEOC workplace harassment guidance

S27 EEOC pregnancy accommodations

S28 EEOC medical and drug-testing confidentiality

Source register 3

PRIMARY SOURCES AND REVIEW TRAIL

Sources reviewed for this edition. Links support the legal baseline; the detailed company workflows and forms are proposed operating controls. Confirm current requirements and site-specific applicability before adoption.

S29 NLRB employee rights

S30 IRS applicable large employer determination

S31 TWC drug-testing policy guidance

S32 TWC confidential investigations

S33 TWC final pay

S34 TDI workers compensation coverage verification

S35 TDI non-subscriber reporting

S36 Texas Comptroller matching entity record

S37 Census NAICS 238160

S38 OSHA SIC 1761

S39 RCAT voluntary roofing credential

S40 Legendary company services

Company materials and design references

User-provided Legendary logo, three roof photographs and the first-day gear infographic. The photos are not independent proof of customer identity, project value, completion, warranty approval or safe-work compliance. Use them externally only with the needed permissions.

The prior Legendary confidentiality agreement informed the records-protection topics. No broad non-compete, ten-year no-hire restriction or claim waiver from that document is adopted here. The Bernie capability statement supplied by the user informed the companion packet's presentation.

Version 1.0 - Prepared November 19, 2026. State list, headcount, benefits choices, named contacts and actual implementation evidence remain to be completed by management.