



WGL Advisory Services

Engineering Technical Documentation Checklist

Client Readiness Checklist

Version / date	Version 1.1 2026-05-04
Document label	Client Readiness Checklist
Website area	Engineering technical documentation service page
Priority	Medium
Purpose	Help project teams assemble technical, quality and handover documentation consistently.

Who this checklist is for

Contractors, engineering teams, project managers, mining-service suppliers and site administrators preparing technical or compliance packs.

When to use this checklist

Use it before site access, project commencement, client submission, technical handover, supplier onboarding or internal quality review.

Client / Matter Details

Client / contractor name	Client to complete	Project name	Client to complete
Site name	Client to complete	Client / principal contractor	Client to complete
Tender / project / site reference	Client to complete	Site access or submission deadline	Client to complete
Safety-file status	Client to complete	Document controller	Client to complete
WGL responsible person	Client to complete	Date completed	Client to complete

How to use this checklist

Work through each requirement and tick one of the separate status boxes: Ready, Not Ready or N/A. Add notes/gaps, assign an owner and insert a due date. Attach or organise supporting documents before submitting the checklist to WGL. Where a requirement does not apply, mark N/A and explain why in the Notes / gaps column.

Main readiness checklist

Requirement	Why it matters	Evidence / documents to prepare	Ready	Not Ready	N/A	Notes / gaps	Owner	Due date
Scope of work	Helps WGL and the client confirm readiness, identify gaps and agree practical next steps before work proceeds.	Client to complete with current records, supporting documents and relevant evidence for WGL review.	[]	[]	[]	Client to complete	Client to complete	Client to complete
Drawings and revisions	Supports clear project, technical and compliance evidence for client, site, audit or handover purposes.	Scope, site file, drawings, method statements, inspection records, certificates, registers, photos and handover documents.	[]	[]	[]	Client to complete	Client to complete	Client to complete
Specifications	Helps WGL and the client confirm readiness, identify gaps and agree practical next steps before work proceeds.	Client to complete with current records, supporting documents and relevant evidence for WGL review.	[]	[]	[]	Client to complete	Client to complete	Client to complete
Method statements	Supports clear project, technical and compliance evidence for client, site, audit or handover purposes.	Scope, site file, drawings, method statements, inspection records, certificates, registers, photos and handover documents.	[]	[]	[]	Client to complete	Client to complete	Client to complete
Inspection and test plans	Supports clear project, technical and compliance evidence for client, site, audit or handover purposes.	Scope, site file, drawings, method statements, inspection records, certificates, registers, photos and handover documents.	[]	[]	[]	Client to complete	Client to complete	Client to complete
Quality-control documents	Strengthens accountability, evidence discipline and control visibility before problems become more difficult to fix.	Policies, delegated authority, process maps, approval evidence, control checklists, risk registers and management review records.	[]	[]	[]	Client to complete	Client to complete	Client to complete
Daily/site reports	Supports clear project, technical and compliance evidence for client, site, audit or handover purposes.	Scope, site file, drawings, method statements, inspection records, certificates, registers, photos and handover documents.	[]	[]	[]	Client to complete	Client to complete	Client to complete
RFIs and change notices	Helps WGL and the client confirm readiness, identify gaps and agree practical next steps before work proceeds.	Client to complete with current records, supporting documents and relevant evidence for WGL review.	[]	[]	[]	Client to complete	Client to complete	Client to complete
Completion certificates	Helps WGL and the client confirm readiness, identify gaps and agree practical next steps before work proceeds.	Client to complete with current records, supporting documents and relevant evidence for WGL review.	[]	[]	[]	Client to complete	Client to complete	Client to complete
Handover documents	Supports clear project, technical and compliance evidence for client, site, audit or handover purposes.	Scope, site file, drawings, method statements, inspection records, certificates, registers, photos and handover documents.	[]	[]	[]	Client to complete	Client to complete	Client to complete
As-built records	Helps WGL and the client confirm readiness, identify gaps and agree practical next steps before work proceeds.	Client to complete with current records, supporting documents and relevant evidence for WGL review.	[]	[]	[]	Client to complete	Client to complete	Client to complete

Requirement	Why it matters	Evidence / documents to prepare	Ready	Not Ready	N/A	Notes / gaps	Owner	Due date
Document register	Helps WGL and the client confirm readiness, identify gaps and agree practical next steps before work proceeds.	Client to complete with current records, supporting documents and relevant evidence for WGL review.	[]	[]	[]	Client to complete	Client to complete	Client to complete
Approval sign-offs.	Helps WGL and the client confirm readiness, identify gaps and agree practical next steps before work proceeds.	Client to complete with current records, supporting documents and relevant evidence for WGL review.	[]	[]	[]	Client to complete	Client to complete	Client to complete

Before using this document for project, site or client submission

- Confirm the intended audience: internal, client, principal contractor, auditor, insurer or regulator.
- Use a document register and version-control every file.
- Check that certificates, training records and insurance documents are current.
- Confirm site-specific requirements before relying on a generic pack.
- Keep photos, registers, inspection records and sign-offs organised.
- Escalate safety, engineering or regulatory-certification questions to qualified specialists.

Red flags

- Certificates, medicals, insurance or training records are expired.
- Site file does not match client or project requirements.
- Method statements, risk assessments or equipment inspection records are missing.
- Document versions are uncontrolled or unsigned.
- Asset/equipment registers do not agree to site records.
- Handover documents, drawings or approvals cannot be traced.

Risk rating

Risk rating	Readiness interpretation	Recommended next step
GREEN	Mostly ready. Key records are available, current, complete, and internally consistent.	Proceed with normal review and keep evidence organised.
AMBER	Gaps require attention. Work can proceed, but issues may delay completion or increase review time.	Prioritise the action plan and agree responsibilities with WGL.
RED	Urgent remediation needed. Significant missing records, compliance gaps, unresolved risks, or contradictions exist.	Book a scoping session with WGL before external submission, reliance, or use.

Next-step action plan

Gap	Action required	Responsible person	Target date	WGL support needed
Client to complete	Client to complete	Client to complete	Client to complete	Client to complete
Client to complete	Client to complete	Client to complete	Client to complete	Client to complete
Client to complete	Client to complete	Client to complete	Client to complete	Client to complete
Client to complete	Client to complete	Client to complete	Client to complete	Client to complete

WGL Review Outcome	
<input type="checkbox"/> Ready for submission / use <input type="checkbox"/> Minor gaps to resolve <input type="checkbox"/> Significant remediation required <input type="checkbox"/> Scope discussion required <input type="checkbox"/> Not suitable for submission / reliance yet	
Reviewer: _____	Date: _____
Key comments: _____	
Recommended next step: _____	

WGL call-to-action

Send this completed checklist and supporting documents to WGL Advisory Services for review and practical next steps. Where urgent deadlines apply, contact WGL before submitting documents externally.

Disclaimer

This checklist is a practical readiness guide for discussion and preparation purposes only. It does not constitute legal, tax, audit, assurance, engineering, safety, regulatory certification, or investment advice. Client circumstances, current laws, current regulatory requirements, and source documents must be reviewed before reliance is placed on any output. Engineering, safety, certification and site-access requirements must be confirmed with the relevant qualified professionals and responsible parties.

Source note

Prepared as a practical readiness aid using cidb, COIDA/letter of good standing, tender/site-file terminology and practical contractor documentation practices. Requirements may change. Always confirm current official requirements and client facts before external use.