



HERS Portfolio Desk-top Review

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|-------------------|--|-------------------|--|
| Name: | | | |
| Occupation Title: | | | |
| Depot: | | | |
| Last Review Date: | | This Review Date: | |

| Review Item: | Detail / Evidence / Actions: | Completed: |
|---|------------------------------|------------|
| NHSS8 Document Changes ¹ | | |
| HERS Handbook Changes ² | | |
| HESA Training Specification Updates ³ | | |
| H&S Legislation brought in since last review ⁴ | | |
| Other relevant legislation brought in since last review ⁵ | | |
| Relevant Guidance brought in since late review ⁶ | | |
| New materials / equipment brought in since last review ⁷ | | |
| New working processes brought in since last review ⁸ | | |
| Is the range of Competencies identified in the Portfolio still relevant? ⁹ | | |

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| Outstanding Action Plans, reviewed/updated or resolved in previous year | | |
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Assessed by Authorising Officer:

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|----------------------------------|--|-------------------|--|
| Authorising Officer Name: | | AO Number: | |
| Signature: | | Date: | |

Notes:

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|---|--|--------|--|
| 1. Review latest version of Sector Scheme document version: | | Dated: | |
| 2. Review latest version of Registration Handbook version: | | Dated: | |
| 3. Review latest version of Training Specification version: | | Dated: | |
4. List all relevant H&S legislation and implementation date since last review
 5. List any other relevant legislation and implementation date since last review
 6. List all relevant guidance / standards & implementation date since last review
 7. List any new materials / equipment requiring information, instruction, training
 8. List any new processes requiring information, instruction, training
 9. Ensure a written procedure exists for this within the organisation. An example of how you might do this is to assess the portfolio & card authorisation application, cross-checking the individual's role / tasks against current and latest issue of HERS Handbook to identify additional or redundant tasks; discuss with Qualified Supervisor, supervisor and / or individual

(Don't forget to check the impact of all the above on H&S policy, risk assessments, method statements etc.)