

Using HERS Portfolio Master Forms where available the portfolio SHALL consist of the following:

Section	Items	Comments
Section 1: Background Information	Drivers Licence Check (<i>Note: If employee drives for organisation</i>)	Required or signpost to personnel file
	Personal Profile / CV	Required
	Signatures Page	Required
	Required if any actions identified	Personal Action Plan (<i>Note: Only if Action is Needed/live</i>)
	HERS Application Authorisation	Required
	Desk-Top Review Pro-Forma	Required
Section 2: Actual Evidence	On Site Assessment Sheets	Required
	Record Oral Questioning	Required
	Module Specific Training	Always Required
	Other Evidence (<i>e.g. Module Specific Certificates; Tool Box Talk Certificates; Manufacturers Training Certificates; Product Training Certificates; Qualification Certificates; Work instruction; Job sheets; Photographs (annotated & dated); Risk Assessments; Videos; Audio</i>)	4 pieces of evidence in total, including those above (<i>Note: for re-assessments (every 5 years), on site assessments and recorded questioning only are required - the other two pieces of evidence can be historical</i>)

Types of Evidence to be included in Section 2 – Actual Evidence

For each competency unit the auditor will require 4 pieces of evidence (see section 2 comments); suggestions are detailed below, this is not an exhaustive list, other information may be included if relevant to the operatives' level of works.

1. **Onsite assessment – mandatory**
2. **Oral question assessment sheet – mandatory**
3. **Mandatory Training Certificate**
4. Risk Assessment – site, operative and task specific
5. Completed work instruction/job sheet
6. Additional Training certificate
7. Record of toolbox talk
8. Manufacturers' training certificate in accordance with training specification
9. Photographic, audio, video evidence (MP4 file, maximum 25mb file size)

Where an application is being made for an interim card, the Authorising Officer must provide for each Authorised Element (excluding Found01 which must be completed in accordance with the HERS Handbook), a completed Interim Individual Element Declaration Form.

The Qualified Supervisor must start the onsite assessments as specified within the HERS Handbook.

Where applicable an individual action plan is required to address shortfalls, noting that this precludes the operative from carrying out the associated works. All the initial Authorised Elements must be site assessed before the Interim Card expires and a new Authorised Card Application made.