



HERS Documents

Updates to the HERS Handbook and HERS Portfolio Forms

HERS Handbook

The long-awaited updated HERS Handbook has now been issued, reflecting the required changes to the Highway Electrical Registration Scheme. You will need to familiarise yourself with this updated document, prior to undertaking your next application on the HERS system.

Click here to download the HERS Handbook: https://thehea.org.uk/hers_resources/hers-handbook/

HERS Portfolio Master Forms

As you are aware, last year the HEA launched the new HERS Card Registration System. Following feedback from organisations using this new system, we have been working to update the relevant HERS Portfolio forms.

These new/improved forms can now be completed digitally, helping to streamline the HERS card application process and save time for the Authorising Officers and Qualified Supervisors.

These forms work best on either Adobe Reader/Acrobat or Internet Explorer. If you have any issues using the editable functions, please; in the first instance contact your IT department. If this still proves problematic, then contact the HEA office.

Click here to download the user guide for using the Editable Site Assessment Forms: https://thehea.org.uk/hers_resources/site-assessment-forms-user-guide/

Click here to download the user guide for creating electronic signatures: https://thehea.org.uk/hers_resources/electronic-signature-guide/

Form	Where to download it	When/where to use it
Appendix 3 - Registration of an Organisation	https://thehea.org.uk/hers_resources/registration-of-an-organisation/	Application for a new organisation HERS registration. Complete and send to the HEA office.

ECS - Invigilator

Form	Where to download it	When/where to use it
Invigilator Guide	https://thehea.org.uk/hers_resources/ecs-highway-electrical-health-and-safety-assesment-invigilator-guide/	Invigilator guide for the Electrotechnical Certification Scheme (ECS), Highway Electrical Health and Safety Assessment.
Invigilator Registration Form	https://thehea.org.uk/hers_resources/appendix-5-3-ecs-authorized-invigilator-registration-form/	Form to be completed and sent to the HEA Office when registering to become an ECS Invigilator.
Invigilator Re - Registration Form	https://thehea.org.uk/hers_resources/appendix-5-5-ecs-authorized-invigilator-re-registration-form/	Form to be completed and sent to the HEA Office when re-registering to become an ECS Invigilator.

HERS System Portfolio - Guides

Guides	Where to download it	When/where to use it
Portfolio Quick Guide	https://thehea.org.uk/hers_resources/hers-portfolio-quick-guide/	Refer to this document for a quick overview of the HERS Portfolio requirements, to be used as an Aide Memoire by Qualified Supervisors and Authorising Officers.
Electronic Signature Guide	https://thehea.org.uk/hers_resources/electronic-signature-guide/	Refer to this document – how to create and use an electronic signature.
HERS Site Assessment Form – User Guide	https://thehea.org.uk/hers_resources/site-assessment-forms-user-guide/	Refer to this document – how to use and complete a Site Assessment Form.
Downloading Editable Forms	https://thehea.org.uk/hers_resources/downloading-editable-forms/	Refer to this document – how to correctly download and save the various HERS Portfolio editable forms.
How to register a Competent Person on the HERS System	https://thehea.org.uk/hers_resources/how-to-register-a-competent-person-on-the-hers-system/	Refer to this document – gives a simple step by step walk through the HERS System to register your employee.

Navigating the new HERS System	https://thehea.org.uk/hers_resources/navigating-the-new-hers-system/	Refer to this document – instructions for navigating the new HERS Registration System.
Organisation set-up & registration	https://thehea.org.uk/hers_resources/organisation-set-up-registration/	Refer to this document – instructions for organisation set-up and registration on the new HERS System.

HERS System Portfolio - Background Information

Form	Where to download it	When/where to use it
HERS Portfolio – Personal Profile	https://thehea.org.uk/hers_resources/personal-profile/	To be uploaded to the HERS Registration System as part of the HERS Portfolio.
HERS Portfolio – Operative Authentication Declaration and Signatures Page	https://thehea.org.uk/hers_resources/signatures-page/	To be uploaded to the HERS Registration System as part of the HERS Portfolio – PLEASE NOTE: this is now the only document that requires the employees “wet signature”. Therefore, the date of signing this document MUST reflect the last site assessment completed within the portfolio of evidence. Where additional HERS element/s have been added, a new signed document MUST be completed.
HERS Portfolio – Personal Action Plan	https://thehea.org.uk/hers_resources/personal-action-plan/	To be uploaded to the HERS Registration System as part of the HERS Portfolio – MUST be included for <u>ALL</u> TRAINEE/APPRENTICE and INTERIM Card applications.
HERS Portfolio – Desktop Review Pro-Forma	https://thehea.org.uk/hers_resources/desk-top-review-pro-forma/	To be uploaded to the HERS Registration System as part of the HERS Portfolio and renewed at least annually.
HERS Application Authorisation	https://thehea.org.uk/hers_resources/hers-application-authorisation/	To be uploaded to the HERS Registration System employee portfolio – This form replaces both the Competency Matrix and HERS Authorisation/Application Form. It MUST however be a live updated document and

		contain the signatures of both Authorising Officer and Responsible Manager.
Drivers Licence Check	https://thehea.org.uk/hers_resources/drivers-licence-check/	To be uploaded to the HERS Registration System as part of the HERS Portfolio.

HERS System Portfolio – Competency Actual Evidence Forms		
Form	Where to download it	When/where to use it
HERS Site Assessment Forms - Pt1 Combined Common Areas	https://thehea.org.uk/hers_resources/hers-site-assessment-forms-pt1-combined-common-areas/	To be uploaded to the HERS Registration System - All Part 1 Combined Common Area Site Assessment Forms in editable PDF to be used for Onsite Assessments and HERS portfolio upload.
HERS Site Assessment Forms - Pt2 Specialist Areas	https://thehea.org.uk/hers_resources/hers-site-assessment-forms-specialist-areas/	To be uploaded to the HERS Registration System - All Part 2 Specialist Areas Site Assessment Forms in editable PDF to be used for Onsite Assessments and HERS portfolio upload.
HERS Portfolio – Oral Question Sheet	https://thehea.org.uk/hers_resources/oral-question-sheet/	To be uploaded to the HERS Registration System as part of the employee HERS Portfolio – ensuring questioning requirements are fully met.
HERS Portfolio – Photographic Evidence	https://thehea.org.uk/hers_resources/photographic-evidence/	To be uploaded to the HERS Registration System as part of the HERS Portfolio.
Interim Individual Element Declaration Form	https://thehea.org.uk/hers_resources/hers-interim-individual-element-declaration-form/	To be uploaded to the HERS Registration System for the employee portfolio for INTERIM Card applications into each icon within the element associated with this declaration if evidence is not available - This declaration confirms that the named operative has been reviewed for the element stated below and has been deemed competent for the tasks. This is based on: <ul style="list-style-type: none"> The justification statements

		<ul style="list-style-type: none"> • The expectation that the organisation plans and completes the necessary evidence as specified within the HERS Handbook (including Interim Card criteria) and HERS Portfolio Quick Guide for the named operative in advance of the expiry date for the interim card • Individual action plans will be completed to satisfy the required level of training within a reasonable time during the interim card period before the expiry date and full HERS card reregistration. <p>That where the named operative does not hold the required Highway Electrical Qualification, or the suitable units for the works being undertaken, then the named operative will be registered and inducted with an approved NVQ provider. (Registration Number and signed induction form to be provided as supporting evidence.)</p>
Non-attributable Mandatory Element Declaration Form	https://thehea.org.uk/hers_resources/hers-non-attributable-mandatory-elements/	To be uploaded to the HERS Registration System for the employee portfolio into each icon within the element associated with this declaration - This declaration confirms that the stated mandatory element for the named operative has not been assessed for occupational sector competence as the named operative does not carry out the related works for the competency element stated below.
Refresher 5 Yearly Declaration Exception Form	https://thehea.org.uk/hers_resources/hers-refresher-5-yearly-declaration-exception-form/	To be uploaded to the HERS Registration System for the employee portfolio for Standard Card renewal (Full) into each icon within the element associated with this declaration where evidence is not required – This declaration CANNOT be used to replace the mandatory evidence (see Quick Guide) This declaration confirms that the named operative has been continuously employed and holds a HERS portfolio for a period of 5 years or greater in the element specified below. The

		declaration also confirms the HERS Handbook criteria for HERS refresher assessments and evidence, that the named operatives training is in date as stipulated within the Training Specification and has been uploaded to the HERS Registration System.
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