

Portfolio Quick Guide Issue 4 – Feb 2011

The Portfolio should consist of the following:

Section No.	Items	Comments
Section 1 - General	Contents/Index/Summary of Evidence Page	Required
	Signatures Page	Required
	Personal Profile / CV	Required
	Driving Licence(s) (Note: if employee drives for organisation)	Required or signpost to personnel file
	Personal Action Plan (Note: Only if Action is Needed/live)	Required if any actions identified
Section 2 –Actual Evidence	HERS Handbook Matrix (Note: this is replaced by the On-line Application Form and Authorisation Certificate; however it may be included – and particularly where competence is mapped to a CBQ/N-SVQ portfolio)	Optional
	Copy of On Line Application Form & Authorisation Certificate (Note: Formerly held in section 4)	Required
	On Site Assessment Sheets*	Required
	Recorded Oral Questioning*	Required
	Other Evidence – e.g. Module Specific Certificates; Witness Statements; Tool Box Talk Certificates; Manufacturers Training Certificates; Product Training Certificates; Worksheets; Photographs (annotated & dated); Risk Assessments; Videos; Audio	4 pieces of evidence in total, including those marked * above (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)
Section 3 – Qualifications – Technical Knowledge	Training / Qualification Certificates – signed and dated that the original has been seen. (Note: If not in Section 2 or additional to Section 2)	
Section 4	(Note: this section is no longer required and formerly held the On-line Application Form and Authorisation Certificate)	

Note: The Quick Guide Issue 4 has the following changes from Issues 3:

1. HERS Handbook matrix no longer required as is replaced with On-line Application and Authorisation Certificate
2. In turn, this means Section 4 – which previously held the On-line Application and Authorisation Certificate is no longer required
3. The Contents / Summary / Index has been combined into a single document

This Guide is advisory only; there is no requirement to apply changes to layout and content retrospectively to existing portfolios

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

For each competency unit we will be looking for 4 pieces of evidence* from the list below:

1. On site assessment / skills test – mandatory
2. Oral question assessment sheet – mandatory
3. Witness testimony
4. Unit specific training certificate
5. Record of tool box talk
6. Manufacturers' training certificate
7. Photographic evidence
8. Audio/video evidence

All documents should be signed and dated by the candidate and either the Qualified Supervisor or the Authorising Officer