

COMPETENT ADVISER APPOINTMENT AND ADVICE LOG

Who advises on health and safety and on the environment, the proof of retention, and the advice given

RECORD — ASSESSMENT FILE

KD-CAS-HA-004 Rev A0

Who advises the business on health and safety and on the environment, the proof that they are retained, and the advice they actually gave. CAS v5 Q81 asks for the source of health and safety advice, its competence and two examples from the last 12 months of advice given and action taken; Q117 asks the same for environmental advice (advisory; a micro-business may answer N/A). MHSWR 1999 reg 7(1) requires an employer to appoint one or more competent persons to help it comply — except a self-employed employer not in partnership who is competent to take the measures himself, or partners where at least one of them is competent to take the measures and help the others (reg 7(6) and (7)); reg 7(5) treats a person as competent where they have sufficient training and experience or knowledge and other qualities; reg 7(8) requires a competent employee to be appointed in preference to someone not employed. Element 3 of the SSIP Core Criteria looks for CDM 2015 knowledge in a construction adviser. The adviser's place in the organisation is on KD-HSA-RO-001. MHSWR 1999 reg 7 covers health and safety only; the question set asks for environmental advice at Q117.

An appointment is only half the evidence. The advice logs in sections 5 and 6 are the other half: dated entries, the action taken and the document that proves it, written up as the advice is given — never reconstructed before a submission.

1 THE BUSINESS

LEGAL NAME	COMPANY NO.	PEOPLE EMPLOYED	RECORD DATE	COMPANY LOGO stamp, paste or print it here
RECORD KEPT BY	CDM 2015 ROLES TAKEN	MAIN TYPE OF WORK		

2 SIGNED OFF FOR THE BUSINESS

The advisers named below are appointed by the business for the scope ticked, the retention evidence is on file, and the advice logs are written up from the advice as it was given.

DIRECTOR — PRINTED NAME	POSITION	SIGNATURE	DATE	NEXT REVIEW DUE
RESPONSIBLE DAY TO DAY		YOUR REVISION	WHAT CHANGED AT THIS REVISION	

COMPETENT ADVISER APPOINTMENT AND ADVICE LOG

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RECORD — ASSESSMENT FILE

KD-CAS-HA-004 Rev A0

3 COMPETENT HEALTH AND SAFETY ADVISER — CAS V5 Q81

☐ Internal — a competent employee ☐ External — a consultant or consultancy ☐ Other source — a safety group or trade body (name it below)

ADVISER — NAME	COMPANY (IF EXTERNAL)	POSITION	TELEPHONE	EMAIL
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QUALIFICATIONS — WITH CERTIFICATE REFERENCES	PROFESSIONAL MEMBERSHIP — BODY, GRADE, NUMBER, EXPIRY	CPD CURRENT?
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CDM 2015 KNOWLEDGE — HOW SHOWN	CONSTRUCTION EXPERIENCE
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Scope of the service — tick what the adviser covers:

☐ Policy and arrangements	☐ Audits of the management system	☐ CDM 2015 dutyholder duties	☐ Legal and guidance updates
☐ RAMS and COSHH assessments	☐ Accident and incident investigation	☐ Fire safety on site	☐ Subcontractor assessment
☐ Site inspections	☐ Training and toolbox talks	☐ Occupational health and health surveillance	☐ Urgent advice out of hours

VISITS OR CONTACT — HOW OFTEN	NOT COVERED BY THE SERVICE	APPOINTED FROM	APPOINTMENT REVIEW
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RETENTION EVIDENCE ATTACHED	REFERENCE AND DATE OF THAT EVIDENCE	FILED WHERE
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Appointed for the business (director):

PRINTED NAME	POSITION	COMPANY	SIGNATURE	DATE	TIME
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Appointment accepted by the adviser:

PRINTED NAME	POSITION	COMPANY	SIGNATURE	DATE	TIME
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KD-CAS-HA-004 Rev A0

4 COMPETENT ENVIRONMENTAL ADVISER — CAS V5 Q117 (ADVISORY)

☐ Internal — a competent employee

☐ External — a consultant or consultancy

☐ Other source — a safety group or trade body (name it below)

ADVISER — NAME

COMPANY (IF EXTERNAL)

POSITION

TELEPHONE

EMAIL

QUALIFICATIONS — WITH CERTIFICATE REFERENCES

PROFESSIONAL MEMBERSHIP — BODY, GRADE, NUMBER, EXPIRY

CPD CURRENT?

ENVIRONMENTAL EXPERIENCE

SAME PERSON AS SECTION 2?

NOT APPLICABLE — REASON

Scope of the service — tick what the adviser covers:

☐ Environmental aspects and impacts

☐ Pollution prevention and spills

☐ Energy and carbon reporting

☐ Legal and guidance updates

☐ Waste duty of care and carrier checks

☐ Noise, dust and neighbours

☐ Environmental incidents and complaints

☐ Environmental training

☐ Permits, exemptions and consents

☐ Ecology and trees

VISITS OR CONTACT — HOW OFTEN

NOT COVERED BY THE SERVICE

APPOINTED FROM

APPOINTMENT REVIEW

RETENTION EVIDENCE ATTACHED

REFERENCE AND DATE OF THAT EVIDENCE

FILED WHERE

Appointed for the business (director):

PRINTED NAME

POSITION

COMPANY

SIGNATURE

DATE

TIME

Appointment accepted by the adviser:

PRINTED NAME

POSITION

COMPANY

SIGNATURE

DATE

TIME

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KD-CAS-HA-004 Rev A0

Every piece of advice, as it is given. Q81 asks for two examples from the last 12 months: choose two lines where the advice, the action and the evidence are all on file, and attach both documents.

KD-CAS-HA-004 | Rev A0 | Issued 2026-09-13 | Effective 2026-09-13 | Next review 2027-09-13

Approved for issue by: Author — director, UK principal contractor, SMSTS. Not an independent review.

Approved for issue by: Author — director, OR principal contractor, SMSFS. Not an independent review.

Basis: MHSWR 1999 reg 7; Common Assessment Standard; SSIP Core Criteria.

Built against the Common Assessment Standard question set, Version 5 (Build UK, July 2025). Independent — not affiliated with or endorsed by Build UK, Constructionline or any assessment body.

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KD-CAS-HA-004 Rev A0

The same for environmental advice. Q117 also asks for two examples from the last 12 months.

7 YEARLY LOOK AT EACH ADVISER'S SERVICE

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Approved for **issue** by: Author — director, UK principal contractor, SMSTS. Not an independent review.

TEMPLATE ONLY. Write in what this business actually does and keep the records it names. Not legal advice. Check the current revision at kubitdocs.com.

Basis: MHSWR 1999 reg 7; Common Assessment Standard; SSIP Core Criteria.

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KD-CAS-HA-004 Rev A0

R REVISION HISTORY

Every revision of this document, and every review that found nothing to change. The revision on the front of this sheet is the one you are holding — check kubitdocs.com for the current one before use.

Rev	Date	Class	What changed	Authorised by
D0	2026-09-13	first-issue	First issue.	— not yet approved —
A0	2026-09-13	review	Approved for issue by the author. Content unchanged from the reviewed draft; the draft status strip is removed. No independent third-party review has been carried out.	Author — director, UK principal contractor, SMSTS. Not an independent review.

Class: first-issue - material (the law, a control, a field or the scope changed — past buyers are notified) - editorial (wording or layout only) - review (checked, nothing changed) - withdrawal. Revision prefix D = draft, not approved and not for sale; A = approved for issue by the person named, on the date shown.