

Health and Safety File Index

A CDM health and safety file index with relevant residual risks, document revisions, maintenance information, outstanding items and client handover.

1. Record details and scope

Project

Filled in from the project in SiteSurvey.

Site or premises address

Client or organisation

Record date *

Person completing the record *

This is an index and handover record, not the complete health and safety file. The actual relevant information and documents must be assembled, reviewed and passed to the appropriate person.

For projects involving more than one contractor, CDM 2015 requires the principal designer to prepare a health and safety file containing information likely to be needed for health and safety during subsequent work. Regulation 12 also addresses review, updating and handover, including where the principal designer appointment ends before the project finishes. These are Great Britain duties.

2. File responsibility

Project and file reference *

Principal designer *

Principal contractor

Client recipient *

Information needed for foreseeable subsequent work

3. File contents

File item (copy this block for each one)

Subject and relevance to subsequent work *

Document reference and location *

Revision and date

Residual risk, limitation or important precaution

Review status * (choose one)

☐ Reviewed and included ☐ Outstanding ☐ Superseded ☐ Not applicable

Document owner

Review notes or reason for omission

4. Gaps and transfer

Outstanding information and agreed resolution *

Identify the missing document, its relevance to future work and the person responsible for obtaining it.

Transfer arrangements if the principal designer appointment ends early

Handover file revision

Handover date

Where the file is held and how it can be accessed

Client receipt acknowledgement

5. Actions and review

Are further actions required? * (choose one)

☐ Yes ☐ No

Further action (copy this block for each one; if applicable)

Action and evidence reference *

Person responsible *

Target date

Action status * (choose one)

☐ Open ☐ In progress ☐ Completed

Completion evidence * (if applicable)

Outstanding limitations and information to pass on

Record status * (choose one)

☐ Ready for review ☐ Further work needed ☐ Work or use stopped

Reviewed by

Review date

Author signature *



Signing records the information entered. It does not itself certify legal compliance, remove a limitation or authorise unsafe work.