Health and safety file contents checklist

What a CDM 2015 health and safety file should consider, item by item: what each item means, an entry that tells the next person little and one they can act on, and who usually has the information. Proportion matters more than completeness: answer "not applicable, because..." wherever that is true.

Project and address	CDM principal designer	CDM principal contractor
Client	Checked by	Date

Tick each item that is in the file, or write "N/A" and the reason. Basis: Law = CDM 2015; HSE guidance = L153, Appendix 4; Good practice = PlanOps.

1. The information HSE suggests a file considers	Basis	Where in the file, or N/A and why
☐ **Is there a brief description of the work carried out?** What was built or changed, where, and when. Enough for someone planning the next job to know which parts of the building this file covers.	HSE guidance	
☐ **Are the hazards that were not designed or built out recorded, with how each was dealt with?** The residual risks someone could meet when cleaning, maintaining, altering or demolishing what was built, and what was done about each. HSE gives surveys about asbestos or contaminated land as examples.	HSE guidance	
☐ **Are the key structural principles and safe working loads recorded?** How the structure stands up where that matters for future work: bracing, sources of substantial stored energy such as pre- or post-tensioned members, and safe working loads for floors and roofs.	HSE guidance	
☐ **Are hazardous materials used in the work identified, with where they are?** Materials that could harm someone working on them later. HSE gives lead paints and special coatings as examples.	HSE guidance	
☐ **Is there information on removing or dismantling installed plant and equipment?** What someone needs to know to take out what was installed safely, such as any special lifting arrangements.	HSE guidance	
☐ **Is there health and safety information about equipment provided for cleaning or maintaining the structure?** Anchors, cradles, access hatches, permanent ladders and the like: what they are, where they are, how they are tested and any limits on their use.	HSE guidance	
☐ **Are the nature, location and markings of significant services recorded?** Where the services that could hurt someone are, and how to find and isolate them. HSE gives underground cables, gas supply equipment and fire-fighting services as examples.	HSE guidance	
☐ **Is there as-built information for the building, its plant and equipment?** Information and as-built drawings someone would need for future work, such as the safe means of access to service voids and the position of fire doors. An index helps a reader find them, but it does not replace them: the documents it lists have to be kept and accessible.	HSE guidance	

2. What stays out, and what to carry over	Basis	Where in the file, or N/A and why
☐ **Have documents that will not help future work been left out?** HSE gives the pre-construction information, the construction phase plan, contract documents and method statements as examples of what the file should not include.	HSE guidance	
☐ **Has information still relevant to future work been carried over from those documents?** Anything found or decided during the work that the next person will need: a buried service or a void found during the works, asbestos found and left in place, temporary works left in the ground, a design change made on site.	HSE guidance	
☐ **Does the file point to the O&M manual and other handover documents rather than copy them?** Operating and maintenance information belongs in the O&M manual and fire safety information has its own legal basis. A cross-reference keeps the file short and one version of each document current.	Good practice	

3. Making it usable and passing it on	Basis	Where in the file, or N/A and why
☐ **Is the file in a form someone else can use without the author: clear, concise, indexed and findable?** Any durable format will do, including electronic, as long as it can be retrieved and is kept secure. An index with each document's title and revision lets the next person find what they need.	HSE guidance	
☐ **Does the file say which project it covers, who the CDM dutyholders were and when it was passed on?** A cover page naming the building, the client, the CDM principal designer and principal contractor and the date the file was issued, so a later reader knows its scope and whom to ask.	Good practice	
☐ **Was the file passed to the client at the end of the project?** The principal designer passes it to the client; if there is no principal designer by then, the principal contractor does (CDM 2015, regulation 12(10)). Recording who received it and when is good practice.	Law	
☐ **Does the client know to keep it available, update it and pass it on?** The client must keep the file available to anyone who needs it to comply with the law and revise it as new information arrives (regulation 4(5)(b)), and pass it on if they sell their interest in the building (regulation 4(7)).	Law	

This checklist covers the CDM 2015 health and safety file in Great Britain. It is a voluntary aid informed by CDM 2015 and HSE guidance: it is not HSE-approved, and completing it does not by itself show compliance. A file should be proportionate to the project and its risks. The worked examples are illustrations, not a template. Other handover documents, such as the O&M manual, fire safety information under regulation 38 of the Building Regulations 2010 and golden thread information for higher-risk buildings, have their own requirements.

Sources: CDM 2015, regulation 12 (legislation.gov.uk) (https://www.legislation.gov.uk/uksi/2015/51/regulation/12); CDM 2015, regulation 4 (legislation.gov.uk) (https://www.legislation.gov.uk/uksi/2015/51/regulation/4); HSE, L153 Managing health and safety in construction, Appendix 4 (https://www.hse.gov.uk/pubns/books/l153.htm).

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