

Height Safety Group

Technical File Folder Template

Technical File Folder Structure

➤ Why use a Technical Folder Structure

- It is essential full project enquiry information through to the invoice and inspection stages of conversations/documentation is easily re-produced, where required, to create a printed “Technical File”. Further this process will provide the duty holder with the full project information and mitigation for any business & its employees should something untoward occur in the future – It may be many years following initial installation when there has been a change in staff. Its essential the duty holder keeps this information safe and stored appropriately.

➤ Correspondence with Customers

- **Conversation Notes** – All discussions leading up to final design should be noted & recorded. Why? So the reasons for product selection and final solution can be established years later.
 - When the duty holder rejects the initial proposal and insists on his/her own design, which may not be a suitable solution, this decision must be recorded and evidenced.
- **Emails** – Save all emails centrally in a chronological order.
- **Customer Enquiry** – Save the initial enquiry which may come in different formats.

➤ Design

- **Specification** – Full specification including product selection, base material and fixings. Specification of PFPE and training requirements.
- **Design Risk Assessment** – This needs to follow the hierarchy of controls process to establish the final end product solution.
- **Drawings** – Initial concepts and final proposed – use a numeric number sequence and a new version number every time a new drawing is issued.
- **As Built Drawings** – Essential as this is the final drawing detail.
- **Third Party Calculations** – Calculation brief/specification for third party calculation and written/rational explanation of calculations. Essential to establish if proposed solution is fit for purpose.
- **Internal Calculations** – Calculation brief/specification for third party calculation and written/rational explanation of calculations. Essential to establish if proposed solution is fit for purpose.

➤ Quotation Proposals

- **Duty holder Copies** – May be two or three different options for duty holder to consider - Copies that do not contain commercially sensitive information may be passed to third parties. Please provide calculations.
- **Confidential** – Contains commercially sensitive information such as the pricing calculators showing margin etc.

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➤ Customer Instruction Order

- **Order** – Duty holder order received.
- **Order Confirmation** – Confirmation in accordance with quotation and include Terms & Conditions of order.
- **T&C** – Essential the Business Terms & Conditions are sent to the duty holder with the order confirmation.

➤ Health & Safety

- **Risk Assessments** – Essential - product and site specific.
- **Method Statement** – Safe Systems of Work – Essential - product and site specific.
- **COSHH Data Sheets** – Relate to any substances used for specific installation.
- **Lifting Plan** – Required where cranes are used.
- **Near Miss & Accidents** – Keep details within project folder.

➤ Installation

- **Purchase Orders** – All purchase orders sent to all suppliers including sub-contractors.
- **Purchase Invoicing** – All invoices received for purchases relating to project including sub-contractors.
- **Bill of Materials** – All suppliers bill's of materials together with batch numbers and serial numbers where appropriate.
- **Permits** – permits required for installation to proceed (Hotworks/parking etc)
- **Variations** – Any variations to the project
- **Job Ticket Sheet & Sign Off** – Initial ticket issued to installation crew and signed off by team leader.
- **Photos Before Installation** – Extremely important to establish condition of site/roof before works started.
- **Photos During Installation** – Required for System Technical File to inspect installation going forward, especially hidden elements.
- **Video Whats App Final Installation** – Recommended to provide full evidence of what and where product solution installed.

➤ Confirmation of Installation in Accordance with System Design Specification – Installation must comply with specification.

➤ Traceability Documents

- **Delivery Notes, Serial Numbers, Batch Numbers** – Legally required for all PPE supplied including shuttle/travellers and Dead Weight Anchors.



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➤ **Current Manufacturers Literature**

- **IFU and O&M Manuals** – Essential current manuals are saved within the technical file as they will be updated and potentially no longer available in the future.

➤ **Product Data** - Essential current product data is saved within the technical file as this will be updated and potentially no longer available in the future.

➤ **System Commissioning Certificates** – Use the standard templates (BS 7883)

➤ **Examination Scheme** – List of required product/installation checks.

September 2025