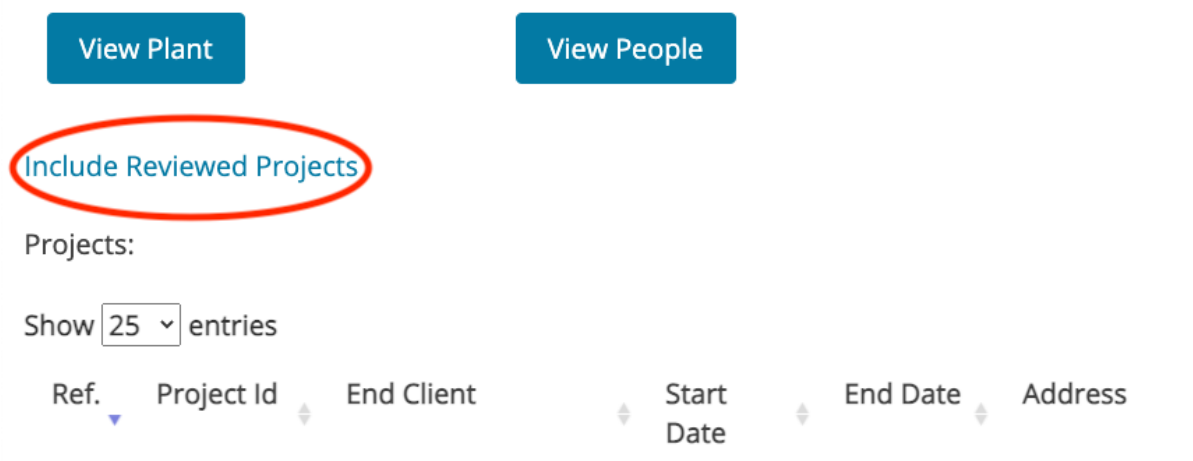## How to Review and Archive a Paperless Project

There are various Status levels to a Paperless project that indicate at what state it is in the process. All steps must be followed in order:

1. Design means the project has not started
2. Live means the project has started (**Live** means that this is the final day - or after the final day)
3. Review means the project has been declared finished by the supervisor
4. Admin means the Contracts Manager review is complete and is waiting on the pre-archive checks
5. Escalate is an extra process – if the Admin team identified issues / anomalies they can escalate to senior management for investigation

After the whole process is complete the project will disappear from the dashboard and you will need to click the 'Include Reviewed Projects' button above the project list to reveal it.



This how to guide is intended to explain the last three steps.

## Review

The CM would have been able to review the paperwork as it was being completed, this represents the final checks to ensure that they are satisfied that the Supervisor has indeed completed the project satisfactorily.

Points to look out for are

1. Was the site attendance as expected?
2. Do the Site Diary entries identify any areas of concern that require follow up (e.g. property damage or scope drift)?
3. Does the Exposure tab reveal all the expected personal monitoring tests and are there any elevated personal monitoring results that have not been investigated?
4. Work Areas – are all the work areas listed and complete? Did any fail the visual prior to final sign off? Are you satisfied that the second signatories (analyst in the case of an enclosure and Client / Tenant in the case of a semi-controlled area) are as expected?
5. Plant was this checked correctly on the days that you expect.

Once satisfied hit the Sign-off Review button (and the follow up 'are you sure' step).

Waste Run - N/A - N/A
Project Work Area    Semi-Controlled - 7530 - Respirator zone

| Prepare Project Report | | Sign-off Review | | Reject Review |

| Induction | Register | Shift | SiteDiary | RPE | Visitor | Expos |

Show 25 entries

| Operative | ▼ | Area | ⇕ | Check | ⇕ |

This will hand over the project to the admin team for final checks and archiving. If not satisfied – hit the Reject Review button and this will hand back to the Supervisor.

## Admin

This is the final full step and is more structured than the CM review.

The top indicates the progress that has been made so far. This states that there are four steps and none are as yet complete.

You will note that it is not possible to archive the project without completing the process.

If the team can not archive the project – there are issues or errors they have two choices either Reject Admin Sign-off to pass back to the CM or Escalate. Escalate creates a special H&S Action for senior management to investigate anomalies.

Admin Questions status: Not Completed

| Num. | Question | Response | Status |
| --- | --- | --- | --- |
| 1 | Has all paperwork been adequately completed? | | Not Completed |
| 2 | Number of 4SC to upload | | Not Completed |
| 3 | Personals uploaded | | Not Completed |
| 4 | Appropriate waste notes uploaded? | | Not Completed |

| Save all changes | | Archive | | Escalate |

| 1 | 2 | 3 | 4 | |

Question: Has all paperwork been adequately completed?
○ Yes ○ No

Assure360 can build in almost limitless steps into this process to satisfy your archiving requirements. Here are some examples:

In this example, is a simple review of paperwork and whether it has all been completed. This could be more complex with an assessment as to whether the final RAMS from the project were the initial RAMS without any amendments. If there were amendments – you would be able to upload the RAMS and Escalate for investigation.

Admin Questions status: Not Completed

| Num. | Question | Response | Status |
| --- | --- | --- | --- |
| 1 | Has all paperwork been adequately completed? | | Not Completed |
| 2 | Number of 4SC to upload | | Not Completed |
| 3 | Personals uploaded | | Not Completed |
| 4 | Appropriate waste notes uploaded? | | Not Completed |

| Save all changes | | Archive | | Escalate |

| 1 | 2 | 3 | 4 | |

Question: Has all paperwork been adequately completed?
○ Yes ○ No

In this example 360 'knows' the number of enclosures, and the number or attempted 4 Stage Clearances attempted. It has determined (because it was a Non-licensed project), that none are required. If there had been 1 enclosure, that had failed, then ultimately passed – this would require two uploads. In that case – it would demand two certificates to be uploaded.

Admin Questions status: Not Completed

| Num. | Question | Response | Status |
|------|----------|----------|--------|
| 1 | Has all paperwork been adequately completed? | | Not Completed |
| 2 | Number of 4SC to upload | | Not Completed |
| 3 | Personals uploaded | | Not Completed |
| 4 | Appropriate waste notes uploaded? | | Not Completed |

[Save all changes]        [Archive]        [Escalate]

| 1 | 2 | 3 | 4 |

Question: Number of 4SC to upload

Number of 4SC Required: 0

Evidence:

[Choose file] No file chosen
[Choose file] No file chosen
[Choose file] No file chosen
[Choose file] No file chosen

In this example 360 has identified that a single personal monitoring test has been logged to the project – but the original certificate has not been uploaded to the record in the Exposure Tab. Go to the appropriate record and upload.

Admin Questions status: Not Completed

| Num. | Question | Response | Status |
|------|----------|----------|--------|
| 1 | Has all paperwork been adequately completed? | | Not Completed |
| 2 | Number of 4SC to upload | | Not Completed |
| 3 | Personals uploaded | | Not Completed |
| 4 | Appropriate waste notes uploaded? | | Not Completed |

[Save all changes]        [Archive]        [Escalate]

| 1 | 2 | 3 | 4 |

Question: Personals uploaded

Personals with certificates 0/1

This example is requesting that a review is made of the WCN and confirmation that it details the appropriate amount and type of waste. It is also asking for the WCN(s) to be uploaded.

Admin Questions status: Not Completed

| Num. | Question | Response | Status |
|------|----------|----------|--------|
| 1 | Has all paperwork been adequately completed? | | Not Completed |
| 2 | Number of 4SC to upload | | Not Completed |
| 3 | Personals uploaded | | Not Completed |
| 4 | Appropriate waste notes uploaded? | | Not Completed |

[Save all changes]        [Archive]        [Escalate]

| 1 | 2 | 3 | 4 |

Question: Appropriate waste notes uploaded?

○ Yes ○ No ○ NA

Evidence:

[Choose file] No file chosen
[Choose file] No file chosen
[Choose file] No file chosen
[Choose file] No file chosen