Subcontractor pre-qualification questionnaire

For the subcontractor to fill in and return to the builder, with a copy of each document asked for.

Builder (return this form to) _____ **Job or project** _____

Date sent _____ **Please return by** _____

Answer every question. Where a question does not apply, write 'not applicable' and why. Attach a copy of each document asked for, and keep a copy of the form yourself.

A builder who appoints a contractor must take reasonable steps to check that the contractor has the skills, knowledge and experience, and, for a firm, the organisational capability, to do the work safely. Your answers help the builder do that.

Company details

Company name _____ **Trading name, if different** _____

Address _____ **Company registration number (limited companies)** _____

Contact name and role _____ **Phone and email** _____

The work you are pricing for, and your trade or trades

How many people you would send, and whether they are your employees, labour-only workers or your own subcontractors

Accreditation

Accreditation, for example from an SSIP member scheme, is not required by law. If you hold one, give the details below. Either way, answer the rest of the form.

Scheme or body	Certificate or membership number	Expiry date

Insurance

Most employers must have employers' liability insurance, with cover of at least £5 million.

Insurance	Insurer	Policy number	Limit of cover	Expiry date
Employers' liability				
Public liability				
Contractor's all-risk (if the subcontract asks for it)				

Insurance	Insurer	Policy number	Limit of cover	Expiry date
Professional indemnity (if you design)				
Other:				

Attach a copy of each certificate.

Construction Industry Scheme (CIS)

Before a CIS contractor pays a new subcontractor, they need to verify the subcontractor with HMRC. HMRC needs the details below, exactly as you registered them.

Registered for CIS ☐ Yes, with gross payment status ☐ Yes ☐ No

Name registered with HMRC _____

Unique Taxpayer Reference (UTR) _____

Sole trader: National Insurance number _____

Limited company: company UTR and registration number _____

Partnership: partnership UTR, trading name and nominated partner _____

Training and cards

A contractor must not appoint anyone to work on a construction site unless they have, or are getting, the skills, knowledge, training and experience for their tasks. List the people you would send.

Name	Job on site	Card type and number (for example CSCS)	Card expiry	Other training or certificates, with expiry

Health and safety policy

If you have five or more employees, you must write your health and safety policy down.

Written health and safety policy ☐ Attached ☐ Not written down (fewer than five employees)

Date last reviewed _____

Who is responsible for health and safety in your firm _____

Example of your RAMS

Attach a risk assessment and method statement (RAMS) you wrote for similar work, so the builder can see how you plan work. You will still need RAMS for this job before you start.

Title and date of the RAMS attached _____

Accidents and HSE action in the last three years

List any injury, disease or dangerous occurrence you reported under RIDDOR, and any improvement notice, prohibition notice or prosecution. Write 'none' if there were none.

Date	What happened	Reported under RIDDOR?	Notice or action, and what you changed

References

Give two recent jobs the builder can ask about.

Client or main contractor	Contact name, phone or email	The job, and when	Size of job (optional)

Declaration

I confirm the answers on this form are true and complete. I will tell the builder if anything changes, for example if a policy or certificate expires or is cancelled.

Signed _____ **Name** _____

Position _____ **Date** _____

For the builder

Check the certificates against the answers: the names, the cover and the expiry dates. Keep this form with your record for this subcontractor.

Checked by _____ **Date** _____

Next expiry to watch _____ **Next check due** _____

Decision ☐ Approved ☐ More information needed ☐ Not approved

Based on: CDM 2015, regulations 8 and 15; the Employers' Liability (Compulsory Insurance) Regulations 1998, regulation 3; HSE40; HSE, Health and safety conformity assessment schemes; HSE, Prepare a health and safety policy; RIDDOR 2013, regulation 3; HMRC, What you must do as a CIS contractor.

- CDM 2015, regulation 8: https://www.legislation.gov.uk/uksi/2015/51/regulation/8
- CDM 2015, regulation 15: https://www.legislation.gov.uk/uksi/2015/51/regulation/15
- The Employers' Liability (Compulsory Insurance) Regulations 1998, regulation 3: https://www.legislation.gov.uk/uksi/1998/2573/regulation/3
- HSE, Employers' Liability (Compulsory Insurance) Act 1969: a brief guide for employers (HSE40): https://www.hse.gov.uk/pubns/hse40.pdf
- HSE, Health and safety conformity assessment schemes: https://www.hse.gov.uk/competence/accreditation-schemes.htm
- HSE, Prepare a health and safety policy: https://www.hse.gov.uk/simple-health-safety/policy/index.htm
- RIDDOR 2013, regulation 3: https://www.legislation.gov.uk/uksi/2013/1471/regulation/3
- HMRC, What you must do as a CIS contractor: verify subcontractors: https://www.gov.uk/what-you-must-do-as-a-cis-contractor/verify-subcontractors

Blank template from The Site Book, October 2026. Fill it in for the job you are pricing and return it to the builder.