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Guide to Contractor Management and the Benefits of Using Contractor Genie



What Contractor Management Means

Contractor management refers to the process which organisations use to ensure contractors are qualified, safe, compliant, and effectively managed throughout their engagement. It covers onboarding, competency checks, risk control, communication, monitoring, and performance evaluation.

This aligns with current UK guidance, including HSE expectations and wider compliance frameworks.

A system that ensures contractors “meet your standards” and work safely, legally, and reliably.

A process that helps businesses stay “efficient, safe and compliant” while maintaining strong working relationships.

A method for reducing risks and ensuring quality service delivery across the workplace



Responsibilities

The Organisation (Client Company that is hiring the contractor)

01. Select competent contractors.

02. Request information from the contractor- Insurance, Training and qualifications, Health and Safety Policy, Accident Data, RAMs etc.

03. Create permits for high-risk works in partnership with the contractor

04. Provide relevant site information, hazards, and rules.

05. Ensure contractor activities are planned, supervised, and monitored.

06. Review contractor performance and address non-compliance.

07. Report and investigate incidents involving contractors.

Contractors

01. Work safely and comply with all legal requirements.

02. Provide competent personnel with appropriate training and certification.

03. Submit risk assessments and method statements (RAMS), and insurance documents, etc., as requested by the host company.

04. Follow site rules, instructions, and permit systems.

05. Report hazards, incidents, or unsafe conditions immediately.



Why It Matters

Legal Compliance

- Organisations must meet duties under the Health and .Safety at Work Act, Management Regulations, CDM, COSHH, and other UK legislation.
- UK employers are legally responsible for the health and safety of contractors on their sites

Risk Reduction

- Creating a strong safety culture is one of the most effective ways to reduce workplace risks and improve compliance.
- Providing employees with easy access to accurate health and safety information helps them work safely and confidently.
- By recording incidents, monitoring trends, and analysing data, organisations can identify root causes, implement corrective actions, and continuously improve workplace safety for everyone.

Quality assurance

- Ensures contractors deliver safe, reliable, and consistent services.

Protecting the host company

- Checks are performed by the company that employs the contractor to do work.
- The host company will request information from the supplier that they are a safe contractor to use: Examples include. ISO 14001 and 45001. Training records, RAMS (Risk Assessments and Method Statements) and Insurances.

Key Components of Contractor Management

The Act is supported by numerous regulations that provide more detailed requirements. Some of the most important include:

Legal compliance

- Organisations must meet duties under the Health and Safety at Work Act, Management Regulations, CDM, COSHH, and other UK legislation.
- UK employers are legally responsible for the health and safety of contractors on their sites.

Reduces Workplace Risk

- Contractors often perform higher-risk work. Effective management prevents incidents, delays, and compliance failures. Poor contractor oversight can create safety, operational, financial, and reputational risks.

Quality assurance

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Prequalification & Competency Checks

- Verifying training, certifications, insurance, and experience.
- Requesting that Health and Safety Policies are in date for their colleagues
- Visitor Management

Onboarding & Induction

- Site rules, emergency procedures, hazards, and expectations.
- Clear communication channels and responsibilities.

Risk Assessment & Safe Systems of Work

- Ensuring contractors provide RAMS.
- Aligning contractor controls with the organisation’s safety standards.

What does Contractor Genie do?

Contractor Genie is used by organisations to manage contractors safely, consistently, and in full compliance with UK legislation. The platform provides a centralised system for onboarding, competency checks, document control, risk management, and overall contractor oversight. It helps the host company (Client) approve, manage and monitor contractor compliance, ensuring requirements are met before and during every site visit.

Suppliers

- Suppliers are required to provide organisation-wide compliance information, such as ISO certifications, Health and Safety policies, and accident statistics.
- This ensures the company has full visibility of supplier standards before any work is approved.

Visits

- When a client (host company) requests a contractor to attend the site to carry out work, a Visit is created in Contractor Genie.
- The client sends an invitation that includes all required documentation—for example, RAMS or other job-specific information.

Visitor

- Each Visit will have one or more Visitors attending the site. Visitors may be required to upload ID cards, provide relevant training records, and review and accept the Site Health and Safety information before access is granted.

The system will monitor the documents that have been sent by the Contractor and send out reminders to the Contractor if those documents(requirements) have expired. Effectively managing the Contractors for the company

Benefits of Using Contractor Genie

Contractor Genie

Centralised Contractor Management

- Everything related to contractors—documents, RAMS, inductions, visits, audits, and performance—lives in one secure platform.
- No more scattered spreadsheets, emails, or manual tracking.

Strong Compliance with UK Legislation (CDM)

- Contractor Genie helps organisations meet their legal duties under UK health and safety law by ensuring:
  - Competency checks are completed,
  - RAMS are reviewed and approved,
  - Inductions are recorded.

Streamlined Onboarding

- Contractors can upload:
  - Insurance
  - Training records
  - Certifications
  - Company policies
  - RAMS
- The system validates and stores everything, speeding up approvals and reducing admin time.

Clear Supplier Requirements

- Suppliers can be asked to provide organisation-wide compliance information such as:
  - ISO certifications
  - Health & Safety policies
  - Accident statistics
- This ensures only safe, competent suppliers are approved.
- Contractor Genie ensures every contractor follows the same:
  - Documentation requirements
  - Safety expectations
- This creates consistency across the different contractors to supply the relevant information as requested.

Controlled Site Visits

- When a client requests work, a Visit is created with clear requirements. Contractors receive an invitation outlining what they must provide before attending site, such as:
  - RAMS
  - ID cards
  - Training evidence
  - Acceptance of site rules
- This ensures visitors arrive fully compliant and ready to work safely.

Real-Time Visibility and Insights

- Managers can see:
  - Who is on site
  - What work is being carried out
  - Which documents are approved or expired

Automated Records and Traceability

- Every action—uploads, approvals, inductions, audits, incidents—is time-stamped and stored. This makes internal and external audits significantly easier.

Reduced Administrative Burden

- Automated workflows replace manual chasing, emailing, and filing. Client saves time, reduces errors, and maintains consistent processes across all preferred contractors.

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