

Contractor Selection Checklist

LEV Thorough Examination & Test (TExT)

A practical checklist for Duty Holders selecting a competent contractor to undertake LEV TExT

DHC-003



Practical
Checklist



For Duty
Holders



Review with
Confidence



Evidence for
Assurance

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Purpose & How to Use the Checklist

This checklist is intended to help Duty Holders review proposals from contractors offering to undertake the Thorough Examination and Test (TExT) of Local Exhaust Ventilation (LEV) systems.

It focuses on the proposed competence, scope, methodology, reporting arrangements and practical delivery of the service before an appointment is made.

It is a practical workplace aid. It is intended to complement, not replace, competent technical review, professional judgement, formal LEV training or recognised qualifications.

A “Yes” response means that the proposal contains the relevant information and appears adequate for a Duty Holder review. It does not, by itself, prove that the contractor is competent or that the proposed service will satisfy every legal or technical requirement.

A “No” or “Not clear” response should normally prompt clarification, further evidence or competent professional review before the contractor is appointed.

Use the checklist when:

- appointing a contractor for an initial, periodic or repeat LEV TExT;
- comparing quotations or proposals from different providers;
- confirming that the proposed scope covers every relevant LEV system, hood and process; and
- agreeing the expected methodology, report content, timescale and response to urgent defects before work begins.

Response	Meaning
Yes	Evidence is present and appears adequate
No	Required evidence is absent or inadequate
Not clear	Clarification or competent review is needed
N/A	Not applicable to this system

A completed checklist does not certify an LEV system will be compliant or effective.

Where evidence is incomplete, contradictory or technically unclear, the Duty Holder should obtain competent professional advice before acceptance.

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Part A: Contractor competence and capability

Question	Yes	No	Not clear	N/A
Does the proposal identify the legal entity that will undertake the work and provide appropriate contact details?	☐	☐	☐	☐
Does it identify the named examiner or team expected to undertake the TExT?	☐	☐	☐	☐
Is relevant evidence of training, qualifications, knowledge and practical experience provided for the proposed examiner(s)?	☐	☐	☐	☐
Does the contractor demonstrate experience with LEV systems, processes and contaminants comparable to those at the site?	☐	☐	☐	☐
Is responsibility for technical supervision, report review and authorisation clearly defined?	☐	☐	☐	☐
Does the contractor have access to suitable, maintained and calibrated test equipment?	☐	☐	☐	☐
Are suitable arrangements described for quality assurance and technical checking of reports?	☐	☐	☐	☐
Is appropriate professional indemnity and public liability insurance evidenced where required?	☐	☐	☐	☐
Are any subcontractors identified, together with how their competence and work will be controlled?	☐	☐	☐	☐
Does the proposal explain how conflicts of interest or limitations to independence will be managed?	☐	☐	☐	☐
Can the contractor provide relevant references, sample reports or other evidence of previous work if requested?	☐	☐	☐	☐
Are arrangements in place for secure handling and retention of site information, photographs and reports?	☐	☐	☐	☐
Is the contractor able to communicate urgent findings promptly to the Duty Holder or nominated responsible person?	☐	☐	☐	☐

Part B: Proposed scope and examination methodology

Question	Yes	No	Not clear	N/A
Does the proposal clearly identify every LEV system, hood, branch or process included in the scope?	☐	☐	☐	☐
Are excluded systems, inaccessible areas, production constraints and other limitations stated?	☐	☐	☐	☐
Does the proposed scope include review of available commissioning data, previous TExT reports and system records?	☐	☐	☐	☐
Does the methodology include a visual examination of the complete system and its condition?	☐	☐	☐	☐
Does it include assessment of hood position, use, enclosure and control effectiveness under representative operating conditions?	☐	☐	☐	☐
Does it include suitable qualitative assessment of contaminant capture or containment at each relevant source?	☐	☐	☐	☐
Does it include appropriate quantitative measurements at hoods, ducts, fans, filters and other relevant points?	☐	☐	☐	☐
Does the proposal explain how measured values will be compared with commissioning benchmarks, design data or other suitable reference information?	☐	☐	☐	☐
Does it include examination of gauges, indicators, alarms, interlocks and other controls where fitted?	☐	☐	☐	☐
Does it include assessment of air-cleaning devices, discharge arrangements and any recirculation provisions where relevant?	☐	☐	☐	☐
Does it include identification of defects, deterioration, unsafe conditions and matters affecting adequate control?	☐	☐	☐	☐
Does the contractor explain how representative operating conditions will be achieved or how limitations will be recorded?	☐	☐	☐	☐
Are suitable arrangements included for systems involving hazardous substances, DSEAR risks or specialist control measures?	☐	☐	☐	☐
Does the proposal include a clear procedure for notifying the Duty Holder immediately of serious or urgent defects?	☐	☐	☐	☐
Is the estimated time allowed for the examination realistic for the number and complexity of systems included?	☐	☐	☐	☐

Part C: Reporting, delivery and commercial clarity

Question	Yes	No	Not clear	N/A
Does the proposal define the report format and the information that will be provided for each LEV system?	☐	☐	☐	☐
Will the report clearly identify the site, system, process, hoods, examiner and examination date?	☐	☐	☐	☐
Will it record the examination scope, methods, operating conditions, instruments and measurement locations?	☐	☐	☐	☐
Will measured results be shown alongside relevant benchmarks, design values or previous results?	☐	☐	☐	☐
Will the report include photographs, diagrams or other evidence sufficient to identify systems, defects and measurement points?	☐	☐	☐	☐
Will defects and shortfalls be clearly described and prioritised according to significance or urgency?	☐	☐	☐	☐
Will recommendations state what action is required without implying that unverified remedial work has been completed?	☐	☐	☐	☐
Will the report provide a clear conclusion on system condition and control performance, supported by the evidence?	☐	☐	☐	☐
Will the statutory or recommended date for the next examination be clearly stated?	☐	☐	☐	☐
Are draft review, report authorisation and final issue arrangements explained?	☐	☐	☐	☐
Are the expected site dates, report delivery timescale and arrangements for delays clearly stated?	☐	☐	☐	☐
Does the price clearly identify what is included, excluded and chargeable as additional work?	☐	☐	☐	☐
Are arrangements for aborted visits, inaccessible systems, repeat testing and return visits defined?	☐	☐	☐	☐
Are confidentiality, data ownership and report-use arrangements acceptable?	☐	☐	☐	☐
Are invoicing, payment terms and the period for which the proposal remains valid clearly stated?	☐	☐	☐	☐

Duty Holder contractor selection review

Site / organisation:

LEV system(s) / scope:

Tender / proposal reference:

Contractor / provider:

Date reviewed:

Reviewed by: _____

Section review summary

- ☐ Competence and capability evidence appears adequate
- ☐ Proposed scope and methodology appear adequate
- ☐ Reporting, delivery and commercial arrangements appear adequate

Overall selection decision

- ☐ Suitable for appointment
- ☐ Suitable subject to clarification or documented conditions
- ☐ Do not appoint pending further evidence or revision
- ☐ Refer for competent independent review

Basis of decision / conditions of appointment:

Signature: _____ Date: _____

Clarifications, conditions and actions

Record any clarification, missing evidence, proposal amendment or condition that must be resolved before appointment.

Where a contractor is appointed subject to conditions, the Duty Holder should retain the agreed response and evidence that each action has been completed or incorporated into the final scope.

Action schedule

Action / clarification	Responsible person	Target date	Completed
			☐
			☐
			☐
			☐
			☐
			☐

Final proposal review completed by: _____

Date: _____ Signature: _____

Important limitation

This checklist supports a structured Duty Holder review.

It does not certify a contractor as competent, guarantee the quality of the eventual TExT or replace the need for competent examination, professional judgement, suitable management arrangements or advice where required.



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