



Medium and High Level Order Picker (ABA categories: E1, E2)

Basic Operating Skills Test

Developed by the Accrediting Bodies Association for Workplace Transport (ABA)



BASIC OPERATING SKILLS TEST

E1 (Medium Level Order Picker) E2 (High Level Order Picker)

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BASIC OPERATING SKILLS TEST

E1 (Medium Level Order Picker) E2 (High Level Order Picker)

1. Introduction

This test has been developed and adopted by the Accrediting Bodies Association for Workplace Transport (ABA) as of 01/12/2020 for implementation no later than 01/04/2021 as a means of ensuring national, uniform standards for the testing of Category E order picker operators. Only order picker instructors and examiners who have been trained in its application should carry out this testing process.

Continuous assessment of novice and existing order picker operator's progression will naturally be undertaken during training by instructors, and subsequently by immediate supervisors at the operator's workplaces. This is routine and would normally be conducted fairly informally.

The test shall be administered by a lift truck instructor/examiner who is qualified in accordance with the Health and Safety Executive Approved Code of Practice (ACoP) and supplementary guidance "Rider operated lift trucks: operator training and safe use". The ACoP and guidance gives advice to employers on lift truck operator training and testing. Successful completion of basic operator training should be followed by job specific and familiarisation training, and supervision as described in the ACoP and guidance.

This test can be used as:

- a. Validation of a course of basic, refresher or conversion training
- b. Confirmation of existing standards
- c. Pre employment assessment
- d. Post incident assessment.

Successful completion of this test without prior training does not indicate that adequate training as described in the ACoP and guidance has been provided. Nor does it mean that accredited training and testing has been provided.

HOW DO WE TRAIN AND TEST NON-ENGLISH SPEAKERS?

Many training providers/instructors are now training and testing non-English speakers. You must ensure in all such cases that the applicable legal requirements are met. You should seek specialist legal advice if you are unsure what is required of you/your organisation.

As basic training covers technical information there is a need to ensure that the trainee has the underpinning knowledge in the operation and safety requirements of the equipment category. The Accrediting Bodies Association for Workplace Transport (ABA) strongly recommends that an accredited translator is used and that the answers given by the trainee are translated and written onto the answer sheet.

The translator must print and sign their name, and record their accrediting organisation and registration number, if any, for auditing purposes.

If the translator is not formally accredited the organisation must provide some other written evidence of the translator's competence, impartiality and suitability to provide translation for the test. This must be attached to the test documentation for auditing purposes. If such information is not available at audit the test may be invalidated.

The translator used must not be a co-trainee on the same course and must not alter the sense of any answers given by the trainee. Disciplinary sanctions may be taken in the event of any material changes being made by the translator to the trainee's responses. These may include the revocation of any certificate or registration awarded, and additional sanctions against the instructor or training provider.

TEST OBJECTIVES

E1 (Medium Level Order Picker) E2 (High Level Order Picker)

2. Test Objectives

The overall objective of this formal, predetermined and validated test is to verify the candidate's ability to meet a minimum recognised basic safety standard.

Candidates must pass all elements of the test in order to be successful overall.

The test requires candidates to:

- a. Demonstrate understanding of **pre use checks**, identifying faults and deficiencies and taking the appropriate reporting/remedial action (see section 3)
- b. Undertake a **practical test**:
 - Manoeuvring a laden and unladen order picker, forward and reverse
 - Carrying out a series of depositing and picking exercises within the main aisle
 - Manoeuvring twice in each direction, laden, through a chicane
 - Culminating in depositing a load and parking the order picker correctly (see section 4).
- c. Undertake an **associated knowledge test**, written or oral (see section 5)

PRE-USE INSPECTION

E1 (Medium Level Order Picker) E2 (High Level Order Picker)

3. Pre-Use Inspection

The candidate will be required to carry out a pre-use check, and clearly demonstrate understanding of it. The pre-use check is a visual and functional safety check. It must be carried out in accordance with the Order Picker manufacturer's recommendations and/or the candidate's company organisational procedures.

3.1 Marking

The examiner will assess whether the candidate meets the minimum standards necessary to carry out a pre use inspection correctly and efficiently.

14 of the 21 elements described in the pre-use inspection have been deemed safety critical and if missed/not checked there may be a significant risk to the health and safety of the operator and or any persons and infrastructure in the location of the order picker. The following list of components are deemed as mandatory component checks. A candidate must carry out a full and correct check of these items, failure to do so will result in an automatic referral in this element of the test.

- Fork Arms/Attachment
- Carriage Plate
- Mast
- Mast Rollers and Slides
- Lift Chains
- Chain Pulleys
- Hydraulics
- Safety Gates
- Rated Capacity Plate
- Hydraulic Controls
- Presence Pedal/Switch
- Wheels/Tyres
- Drive & Braking
- Steering

The remaining elements described and listed on the inspection sheet are still required to be appropriately inspected and the examiner will decide if the overall inspection was adequate or not and will pass/refer as appropriate.

The list of items on the pre-use inspection sheet should not be considered complete or finite. It is important to remember that all pre use inspections are to be carried out in accordance with the order picker manufacturers recommendations.

The pre-use check sheets must be retained for future reference and the result recorded on the final assessment document.

PRE-USE INSPECTION SHEET

Medium Level Order Picker and High Level Order Pickers

(ABA Cat: E1, E2) **Operator Use**

No.	ITEM	CHECK COMPLETE	NOT APPLICABLE
1	FORK ARMS/ATTACHMENT		
2	CARRIAGE PLATE		
3	MAST		
4	MAST ROLLERS/SLIDES		
5	LIFT CHAINS		
6	CHAIN PULLEYS		
7	HYDRAULICS		
8	WHEELS/TYRES		
9	EXTERNAL CONDITION		
10	SAFETY GATES		
11	GUIDANCE SYSTEM		
12	RATED CAPACITY PLATE		
13	OPERATING POSITION		
14	STARTING PROCEDURE		
15	LIGHTS		
16	AUDIBLE WARNINGS		
17	EMERGENCY LOWERING PROCEDURE		
18	HYDRAULIC CONTROLS		
19	PRESENCE PEDAL/SWITCH		
20	DRIVE & BRAKING		
21	STEERING		

All Pre-Use checks must be carried out in accordance with the specific instructions published in the relevant manufacturers operating handbook.

PRE-USE INSPECTION SHEET

Medium Level Order Picker and High Level Order Pickers

(ABA CAT: E1, E2) **Examiner/Instructor Use**

Candidate Name:	Test Date:
Order Picker Type:	Model:
Make:	Motive Power:

No.	ITEM	CHECK COMPLETE	NOT APPLICABLE
1	FORK ARMS/ATTACHMENT (MC)		
2	CARRIAGE PLATE (MC)		
3	MAST (MC)		
4	MAST ROLLERS/SLIDES (MC)		
5	LIFT CHAINS (MC)		
6	CHAIN PULLEYS (MC)		
7	HYDRAULICS (MC)		
8	WHEELS/TYRES (MC)		
9	EXTERNAL CONDITION		
10	SAFETY GATES (MC)		
11	GUIDANCE SYSTEM		
12	RATED CAPACITY PLATE (MC)		
13	OPERATING POSITION		
14	STARTING PROCEDURE		
15	LIGHTS		
16	AUDIBLE WARNINGS		
17	EMERGENCY LOWERING PROCEDURE		
18	HYDRAULIC CONTROLS (MC)		
19	PRESENCE PEDAL/SWITCH (MC)		
20	DRIVE AND BRAKING (MC)		
21	STEERING (MC)		
22	FAULT REPORTING PROCEDURE		

Candidate Result	PASS		REFERRED	
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Candidate Signature:
Examiners Name:
Examiners Signature:
Examiners Registration Number:

All Pre-Use checks must be carried out in accordance with the specific instructions published in the relevant manufacturers operating handbook.
MC = Mandatory component check - automatic referral if not fully completed.

PRE-USE INSPECTION

E1 (MEDIUM LEVEL ORDER PICKER) E2 (HIGH LEVEL ORDER PICKER)

Explanation of the Criteria

The candidate will be observed carrying out the pre-use checks. At periodic planned stages, the instructor/examiner will interrupt the proceedings and question the candidate's understanding of the item under inspection. The explanatory notes will assist the instructor/examiner when questioning the candidate during the assessment process.

The following list of items must be fully and comprehensively understood by the candidate. Failure to do so will result in an automatic referral.

- Fork Arms/Attachment
- Carriage Plate
- Mast
- Mast Roller/Slides
- Lift Chains
- Chain Pulleys
- Hydraulics
- Wheels/Tyres
- Safety Gates
- Rated Capacity Plate
- Hydraulics Controls
- Presence Pedal/Switch
- Drive & Braking
- Steering

No.	CRITERIA	EXPLANATORY NOTES
1	Fork Arms/Attachment Mandatory Component	Each fork arm should be checked for wear, cracks and distortion. Check for wear causing thin, jagged edges at the fork tip. Particular attention should be paid to the fork hooks and carriage plate, constant movement between these points causes wear and fracture. The fork arms should be equally spaced on the carriage with the fork retaining pins engaged and secure. Any attachment fitted must be attached appropriately and secure on the carriage plate (if applicable). Locking pins, welded joints, pivots should not be worn, cracked or seized. The attachment must not be bent, twisted or distorted and must be in good, functional working order.
2	Carriage Plate Mandatory Component	The carriage plate should have no obvious damage and sit square to the mast. The end stop bolts must be engaged and secure. The fork locking pins must fully engage into the castellations.
3	Mast Mandatory Component	Checks should be made to the outer mast sections for damage, distortions and cracks. In addition the inner mast channels or runners must be inspected for undue wear, scoring, excessive dirt or any foreign bodies which may be fouling the mechanism. The mast support bars/tension struts must be free from damage. Any dents or cracks must be reported and the truck must not be used.
4	Mast Rollers/Slides Mandatory Component	The mast guide rollers, must not show signs of uneven wear, incorrect tracking, flat spots and scoring. Mast slides must be intact and not loose. The mast support bars/tension struts, must also be checked for damage including cracks and dents.
5	Lifts Chains Mandatory Component	Check lift chains for evidence of deterioration, loose or worn pins, damaged pin rivet heads, worn, cracked or missing links and signs of rust on link plates. Chain anchor points must be inspected for damage, even adjustment and security of the locking nuts.
6	Chain Pulleys Mandatory Component	Chain pulleys should have no obvious damage, uneven wear and flat spots. The chains running over pulleys should show signs of tracking correctly between the riveted end of the chain pins and the walls of the pulley flanges.
7	Hydraulics Mandatory Component	All hydraulic rams, seals and couplings must be checked for damage and leaks. Particular attention should be given to where the piston emerges from the outer cylinder for any oil, corrosion and scoring on the piston. Examine all visible hydraulic hoses/pipes for kinks, damage, crushing, abrasion leaks or signs of fouling which could result in a possible hydraulic leak. Any hose reel mechanisms (if fitted) should be undamaged and running freely with no evidence of hydraulic oil leaks.

No.	CRITERIA	EXPLANATORY NOTES
8	Wheels & Tyres Mandatory Component	There should be no obvious missing or loose wheel nuts. The wheel rim and hub should be examined for damage, cracks and scoring. Inspect the stub axles, steering assembly and guidance wheels (if fitted) for excessive dirt or any foreign bodies especially polythene shrink wrap, banding etc. which may be fouling the mechanism.
9	External Condition	Examine the general condition and security of the machine's, overhead guard, battery and engine covers, doors and panels should be complete, damage free and secure. Inspect the bodywork for damage, rust, broken hinges, or locks, battery access panels etc. which could be detrimental to the trucks safe operation. Mirrors [if fitted], lights and warning devices should be in working order, clean, and free from damage. When walking around the truck, the operator should check on top of the mast section, tie bars, overhead guard or cab, for articles which may have been left there which could fall when the truck is operated. In addition the operator should ensure there are no water, oil, fuel or any other type of fluid leaks. Wheel guards or covers must not be in contact with the tyres.
10	Safety Gates Mandatory Component	Examine the general condition and security of the trucks safety gates. Ensure that are not damaged, intact and open and close smoothly. If fitted with proximity sensors, ensure these are detecting the closure and opening of the gate.
11	Guidance System	Guidance System ensure the aisle guidance systems in functioning correctly. If the order picker is using guidance wheels/tyres, check to sure the area is free of debris and is in good working order. Electronic systems and guide by wire, must be check once truck is safe to manoeuvre.
12	Rated Capacity Plate Mandatory Component	The rated capacity plate must be fitted, it must be secure, clear and legible and display, at least, the maximum weight the order picker can pick up, the load centre and the maximum lift height, appropriate to the order picker and or any attachments fitted.
13	Operating Position	The floor and cockpit area should be dry and clear of dirt or any foreign bodies, which may be fouling the operating controls, safety switches or devices. Foot and hand operated controls and instruments should be intact, undamaged and functional. Visual gauges, decals and instruments should be unobstructed, clean and intact. Seats or back rest cushions (if fitted) need to checked for splits, cuts and general condition of the webbing. The buckle must securely retain the belt in place and be capable of being released when under tension. Check the seat and back rest adjusters to ensure they are intact, damage free and functional.

No.	CRITERIA	EXPLANATORY NOTES
14	Starting Procedure	The traction battery is secure and the power supply cable is intact, connected and secure. Confirm adequate charge. Ensure the on/off key switch system activates the power and the isolator switch [if fitted] functions correctly. Physically and visually check any additional interlocks or gauges to ensure they are functioning in accordance with the specific manufacturer's operating handbook.
15	Lights	Any service lights fitted should be in working order. This includes direction indicators, reversing lights, brake lights, flashing beacons, presence lights, spot/working lights etc. Lenses should be free from damage, clear of debris, secure and be able to be seen at a reasonable distance by others.
16	Audible Warnings Devices	The machine must not be operated if the horn is defective. If there is an audible warning device, check that it activates and can be heard, e.g. if you leave the cockpit without switching off the power or fail to apply the parking brake, selecting reverse gear, height, weight and pressure limit switches, leave a safety gate open etc.
17	Emergency Lowering Procedure	Check the location on the truck for the emergency lower of the truck hydraulics, in the event of a truck being stuck at height. Ensure (if applicable) the key is easily locatable, and or there is an engineer on site that can lower in the event of an emergency.
18	Hydraulic Controls Mandatory Component	All hydraulic driven parts (mast height etc.) must be run to their end positions, to lubricate all the moving parts, checking for their serviceability, smooth operation, obvious leaks and that there is sufficient oil in the tank.
19	Presence/Switch Mandatory Component	Check to ensure correct operation (if fitted) by activating the presence pedal or switch as per the manufactures handbook. Do not operate the machine if the operator presence pedal is defective.
20	Drive and Braking Mandatory Component	Forward and reverse should be engaged to ensure their smooth operation and positive response to the accelerator control. The parking brake should be tested by slowly driving and then apply the brake, the truck must stop. The efficiency of the braking control should be tested in both directions, braking must be even. Order pickers may be fitted with hydrostatic, rheostatic regenerative or opposite direction braking systems, in addition to mechanical brakes, these must be checked to ensure they are functional in accordance with the manufacturers operating handbook.

No.	CRITERIA	EXPLANATORY NOTES
21	Steering Mandatory Component	Check for excessive play in the steering wheel before starting the truck. Avoid turning the wheels of the truck whilst stationary, this may subject the steering mechanism and tyres to unnecessary wear or strain. Aisle engagement devices, rail or wire guided systems, need to be checked to ensure they can safely engage the guide rails, without unnecessary friction. The operator should move the truck in both directions checking the steering operation fully on both locks. 180 and 360 degree steering systems should function correctly and any steering instrument indicators should correlate to the wheel position.
22	Fault Reporting	The candidate must satisfactorily explain the action to be taken in the event of discovering a fault on the truck at the start or during any operating period, i.e. isolating the truck, displaying of warning signage, any company policies and procedures, reporting to managers, supervisors etc, completion of documentation.

NOTE:

- a. The Pre-Use inspection information provided, has been determined as the minimum number of items to be checked on an order picker before operation and is not definitive.
- b. All pre-use checks and attachment inspections must be carried out in accordance with the specific instructions published in the manufacturers operating handbook.
- c. It is recognised that harness/restraint systems will in some cases be in use. The inspection and use of these, do not fall part of the ABA testing criteria, however it is strongly advised, that if these items are being used, then relevant checks prior to the course commencing are undertaken.

PRACTICAL TEST OF BASIC OPERATING SKILLS

E1 (Medium Level Order Picker) E2 (High Level Order Picker)

4. Practical Test of Basic Operating Skills

This test has been devised to examine the critical skills required of a order picker operator, these are:

- Starting and stopping the truck
- Driving forward and in reverse, including braking
- Steering accuracy
- Engagement into and from an aisle
- Loading and retrieving using the load platform/pallet
- Using hydraulic controls correctly and sympathetically
- Judging the position of fork tips at varying heights, laden and unladen
- Depositing and picking accurately at various heights
- Observation of the working environment and judgement of speed, height, width and distance from within the confines of the machine.

The test is based on the safe application of these operations at a reasonable working pace. Care has been taken to design a course which covers all the critical skills, while being easily constructed on most company premises.

4.1 Setting up the Practical Test Course

Test Course Materials

The test course has been designed to utilise the order picker based on an operating environment which include the use of pallets, loads and high bay racking. All loads handled by the order picker during the test should be of identical width, length and weight to simulate realistically the candidate's work.

Locating and engaging an aisle safely, while ensuring efficiency of loading and retrieving a load.

Chicane

The chicane may be constructed using hurdles, empty pallets or existing features and consist of the minimum one left and one right turn in either sequence. Care should be taken during construction to create the correct distance between each turn to be negotiated (see plan of course). Due to the size of the machine, the creation of a chicane may not always be possible, so the use of alternative methods may be required to create sure accurate steering and manoeuvring, including the use of transit aisles and actual aisles if permitted by the site. Traffic cones and other materials which permit gaps in the chicane are not suitable for this purpose. The distance from the chicane to the test aisle is not critical.

However, care should be taken to allow sufficient separation distance so that the candidate, when emerging from the chicane, may position the truck correctly prior to undertaking the first picking operation.

Note: If using empty pallets, care must be taken to ensure that the pallets are secured and stable, this is in order to reduce the risk of damage or injury to persons in the event of a pallet falling over.

Critical Dimensions

The width of the chicane will be the practical minimum negotiating width for the laden order picker plus a clearance of 75mm at the critical points, (pivot point, truck and load extremities) of each turn (see plan of course).

Main Aisle

The width of the main aisle will be the manufacturer's minimum aisle width for that particular truck.

The theory minimum aisle width may be obtained from the manufacturer if not already published in the technical literature supplied with the truck.

Empty and palletised loads, simulated ready for picking, should be stacked or racked in line at the appropriate levels with 75mm spacing between the loads or the racking uprights where applicable. The space at 'D' should likewise allow for the width of the load with 75mm spacing on either side.

Load 'A': The part of the course forming the vertical face should be sufficiently wide and high to permit the candidate to see it load leading.

The laden pallet should be positioned square, central within 150mm of, but not touching the vertical face.

High Level ‘B’: Refers to the maximum picking height normally to be found in the candidate’s working environment for the particular truck and loads in use.

High level is a minimum of 3m picking height, in situation where the maximum picking height is less than 3m the certificate must be clearly and suitably endorsed.

Medium Level ‘C’: Refers to the stacking position situated between high and low level to be found within the candidates own working environment.

Low Level ‘D’: Refers to the picking position at, or about, ground level.

Load at ‘A’ (see plan of course)

The part of the course forming the vertical face should be sufficiently wide and high to permit the candidate to see it load leading.

The pallet should be positioned square, central within 150mm of, but not touching the vertical face.

High Level at ‘B’ (Not applicable for E1 category trucks)

Refers to the maximum picking height normally to be found in the candidate’s working environment for the particular truck and loads in use.

High level is a minimum of 2501mm picking height. Whilst using an E2 category truck in situations where the picking height is less than 2501mm any certification issued for successfully completing the basic operating skills test must be clearly and suitably endorsed

Medium Level at ‘C’

Refers to the picking position situated between high and low level to be found within the candidates own working environment.

Low Level at ‘D’

Refers to the picking position at, or about, ground level. (Approx 299mm).

Note: Should racking be involved, the levels referred to will correspond as closely as possible to the above requirements, depending on the level of beams available.

4.2 Alternative Test Construction

Every effort should be made to construct the course in one continuous area as shown in **test course**, but, where the area is insufficient to construct the complete test course, the chicane may be entirely separate from the main aisle, effectively dividing the test into two parts.

Part 1.

Will start at the position shown on the plan and will commence by picking up the pallet from the vertical face, driving through the chicane load leading and load trailing, depositing the load close to the vertical face and finally parking the truck at the finish line.

Part 2.

Covering the various picking and depositing operations, will start at the point where the candidate would have exited the chicane load leading and terminate prior to the point where the candidate would have entered the chicane load trailing.

4.3 Administration and Testing Procedure

Duration of the Test

Candidates are tested not just on their ability to operate correctly and skilfully, but also to do so without undue slowness, hesitancy or excessive speed. Examiners should, therefore, determine a fair and reasonable time for completion of the test.

This will be affected by a number of factors which may include: actual picking heights, lift speed, general manoeuvrability of the truck being used, distances between picking positions, chicane and the main aisle, etc.

The examiner should carry out the complete test at a normal working pace, making careful note of the time taken. For the purpose of the test time penalties, this will be referred to as **the rehearsed time**.

Testing procedure

Prior to the test, the examiner must complete the various sections of the marking sheet, i.e. candidate's details, description of the truck, capacity, etc. (see the Practical Skills Test Marking Sheet).

During the test, only the candidate and the examiner should be in the immediate vicinity of the test area. This will eliminate any potential distractions or hazards to the examiner and candidate.

Before the test begins the examiner must ensure that the:

- Order picker is correctly parked, in a secure state at a distance from the first load that requires the order picker to be placed into the travel position and travel to the first load
- Steering wheels of the truck are in the straight line position
- Spread of the forks is both equidistant and suitable for the loads to be used.

(Where applicable)

Walk through the test course

At this point, the examiner will walk the candidate through the course, giving a brief explanation of each operation to be carried out during the test. They should be told that these instructions will be repeated, a step at a time, while the test is in progress. The test is undertaken to assess their operating skills and is not intended to check their memory.

Explanation of the marking sheet

The examiner must explain how the marking system works. Why some faults are more heavily weighted than others, areas of disqualification and the pass/fail cut off criteria. The examiner will explain that where a candidate commits in excess of 3 faults (i.e. 4 or more) in any one fault area where the penalty award is 5 points then that candidate will have not met the required test standard and will have been deemed to have failed the practical element of the test.

The examiner will direct the candidate through the course giving stage-by-stage directions on the operation to be carried out.

During the practical skills test the examiner must maintain a position where the candidate can be continuously observed without causing a distraction or hazard.

The practical skills test should be carried out as follows, (see plan of **course A**):

Load 'A' will contain one layer of goods/stock i.e. boxes etc.

Position 'B' will be full, with one removable layer of goods/stock i.e. boxes etc.

Position 'C' will be minus one layer of goods/stock

Position 'D' will be full, with one removable layer of goods/stock i.e. boxes etc.

Test procedure for E2

1. From start pick up part load at **'A'**
2. Drive forward through the chicane and stop at position **'B'**
3. Raise load and cage and collect 5 parcels from position **'B'**
4. Travel to position **'C'** and transfer 5 parcels to station **'C'**
5. Travel to position **'D'** and collect 5 parcels
6. Travel to position **'B'** and transfer 5 parcels to station **'B'**
7. Travel to position **'C'** and collect 5 parcels
8. Travel to position **'D'** and transfer 5 parcels onto station **'D'**
9. Place the load squarely at low level **A** within 150mm of, but not touching, the vertical face
10. Withdraw the forks and reverse the truck until the fork tips are behind the start/finish line
11. Park the truck correctly
12. Dismount from the truck.

Test procedure for E1

1. From start pick up part load at **'A'**
2. Drive forward through the chicane and stop at position **'C'**
3. Raise load and cage and collect 5 parcels from position **'C'**
4. Travel to position **'D'** and transfer 5 parcels to station **'D'**
5. Travel to position **'E'** and collect 5 parcels
6. Travel to position **'C'** and transfer 5 parcels to station **'C'**
7. Travel to position **'D'** and collect 5 parcels
8. Travel to position **'E'** and transfer 5 parcels onto station **'E'**
9. Withdraw the and reverse with load trailing through the chicane
10. Place the load squarely at low level **A** within 150mm of, but not touching, the vertical face
11. Withdraw the forks and reverse the truck until the fork tips are behind the start/finish line
12. Park the truck correctly
13. Dismount from the truck

Notes

- a. All elements of the test must be completed.
- b. Throughout the practical test course, critical dimensions and layout must be maintained.

- c. Upon successful completion, the test course must be restored to its original state, ready for further use without re-arrangement, except if loads need to be tidied up.

Explanation of the practical skills test result

The examiner will explain to the candidate, what faults occurred and why, time taken and the pass/fail result and where appropriate give recommendations.

Note: the test course layout has been designed and validated to ensure the test can be completed from within the confines of the order picker. Therefore, candidates must be discouraged from dismounting from the truck during the test unless due to a potentially dangerous or hazardous occurrence. Every effort must be made to put the candidate at ease before and at the end of the practical test.

4.4 Marking

Practical test scoring and timing of the test will begin when candidates mount the truck and will finish when they have dismounted on completion of the test.

It is important that faults should be carefully and quickly recorded as they occur during the test, and the test must be administered by an examiner who is well acquainted with the faults list on the marking sheet (see the marking sheet and explanation of faults).

Reference to the marking sheet will show that a penalty has been allocated to each of the faults listed. Those faults deemed to be more serious for the purpose of the test have been allocated weighted penalties accordingly.

On each occasion when a candidate commits a fault, a cross should be marked against the appropriate fault. At the end the examiner must:

- Multiply the number of crosses recorded against each fault by the allocated penalty and enter the result in the award column
- Add up the recorded penalties and enter the total
- Add to this any time penalties incurred to arrive at the final total of penalties.

Where a candidate commits in excess of 3 faults (i.e. 4 or more) in any one area where the penalty award is 5 points then that candidate will have not met the required test standard and will have been deemed to have failed the practical test.

Time Penalties

The **set time** for completion of the test **without penalty**, will be **2 x rehearsed time** (twice the time recorded by the examiner taken to complete the test course when operating at a normal working pace). Clearly, it would be unfair for candidates to be judged against an exceptionally quick test drive by the examiner. Equally, an over cautious test drive would be undesirable, as it would effectively produce a set time for candidates which is too generous.

If the test drive is properly conducted, the resulting **set time** will closely match the time subsequently taken by an average candidate.

Examiners must monitor this aspect of their test results carefully. Wherever a wide variation occurs consistently between the **set time** and candidate's performance times, it would be wise to investigate whether a test drive conducted at above or below normal working pace is a contributory factor.

Candidates who take in excess of the **set time** will incur one penalty for each full or part minute in excess of the set time. Time lost through interruption of the test will not incur penalties.

The maximum test time allowed before disqualification will be 3 x rehearsed time.

Example:

Rehearsed time = 15 minutes (examiner's time)

Set time = 30 minutes (2 x rehearsed time)

Disqualification time = 45 minutes (3 x rehearsed time)

Note: The practical test of basic operating skills is not only designed to ensure candidates demonstrate safe order picker operation, it is also designed to test their efficiency. In addition to the above timing calculations it would not be expected, in normal operating conditions, for the practical element of the basic operating skills test to take more than 45 minutes. Should undue hesitancy or a lack of confidence be shown by a candidate undergoing the test (even if the disqualification time has not been exceeded) examiners should consider referring the candidate.

Pass/Fail Criteria

The cut off for the practical skills test at basic operator level is **40** penalty points. Where penalties are incurred in excess of this figure, candidates will be deemed to have failed the test.

In addition, candidates will be disqualified for:

- **Dangerous/Unsafe Picking:** Where examiners observe a parcel/load is to be left in a potentially unsafe state, or the operator puts themselves at risk by overreaching for items due to incorrect positioning of the truck. The instructor should act immediately to overcome the problem and disqualify the candidate
- **Violent Collision:** Where the candidate allows any part of the order picker or load to violently strike any part of the course
- **Exceeds Maximum Time:** The maximum allowed time to complete the test has been exceeded.
- **Dismounts unnecessarily:** Dismounts from the order picker without instruction and without safely parking the machine
- **Operating dangerously:** Where the candidate operates dangerously or erratically, and the examiner considers it unsafe to continue the test
- **Incurring more than 3 (i.e. 4 or more) 5 point penalties in one area**

Where failures occur, it would be sensible to study the marking sheet for evidence of any particular areas in which the candidate might be given further tuition prior to undertaking the test in the future. Any retest should not be made too soon, ample time should be allowed for the candidate to be effectively retrained before undergoing a further test.

Manual Handling

It is recognised that manual handling can be a considerable factor of the operator while picking/depositing items.

Manual handling is considered, outside of the ABA operator testing standards, and therefore, candidates are not tested/critiqued within the E1/E2 testing standards.

E1 (Medium Level Order Picker) E2 (High Level Order Picker)
Not to Scale

At commencement of the test, load 'A' will contain one layer of goods. Load at position 'B' will be full. Load at position 'C' will be minus one layer, Load at position 'D' will be full.



Training Organisation:

PRACTICAL TEST OF BASIC OPERATING SKILLS

Medium and High Level Order Pickers ABA Categories: E1 & E2

STANDARD MAX PENALTY POINTS ALLOWED

Operator Level 40pts Between 300mm and 2500mm,
E2 - including & above 2501 mm

Date of Test:	Truck Type:	Time	
Candidate Full Name:	ABA WT Category:	A. Set Time:	
	Make:	B. Start Time:	
	Model:	C. Finish Time:	
	Motive Power:	D. Duration:	
	Rated Capacity:	Excess Time (D minus A)	
	Load Centre:	Max. penalty free time allowed = 2 x Rehearsed time	
	Height:	Faults to be recorded as they occur by marking "X"	
Address:	Attachment:		

ANY ALTERATION TO THIS FORM MAY INVALIDATE TEST

No.	Criteria observed	Faults	Penalty	Award
Operator safety and observation				
1	Mounts/dismounts incorrectly		3	
2	Limbs/body outside confines of truck		5	
3	Fails to check all round		5	
4	Fails to look in the direction of travel		5	
5	Fails to use appropriate safety device		5	
6	Fails to check that cage guard rails/gate are closed before moving truck		5	
Steering and operating controls				
7	Travels in wrong direction		5	
8	Brakes harshly/erratically		3	
9	Fails to release parking brake		1	
10	Misuses presence pedal		1	
11	Operates hydraulic controls when moving (except where permitted)		5	
12	Selects wrong hydraulic control		3	
13	Excessive use of hydraulic controls		1*	
14	Rough use of hydraulic controls		3	
15	Fails to engage on guidance system		5	
16	Fails to hold steering wheel/assistor		5	
Manoeuvring and transporting				
17	Fork/cab too high when travelling		5	

No.	Criteria observed	Faults	Penalty	Award
18	Fork/cab load too low when travelling		5	
19	Shunts to negotiate entry into working aisle		3*	
20	Incorrect traveling height		3	
21	Touches guide rails or picking uprights on entry of working aisle		5	
22	Touches course/racking/load		5	
23	Shunts in chicane		3*	
Depositing/Picking				
24	Fails to apply parking brake / release presence pedal		5	
25	Fork arms not central under load		3	
26	Fork arms rubbing (entry/withdrawal)		3	
27	Fork arms not fully inserted		5	
28	Incorrect picking position		3	
29	Load incorrectly stacked		3	
Parking				
30	Fails to apply park brake/engage neutral		5	
31	Fails to lower fork arm/cab		3	
32	Fails to switch off/remove keys		3	
33	Wheels not straight		3	
Add time penalties				

* Allow 1 adjustment per operation

MANDATORY DISQUALIFICATION (Tick appropriate box and record comment overleaf)			
Operates dangerously		Exceeds 3 occurrences of any one 5 point fault	
Exceeds maximum time		Violent collision	
Dismounts unnecessarily		Dangerous/Unsafe picking	

Practical	PASS		REFER	
Pre-use check	PASS		REFER	
Associated knowledge	PASS		REFER	
Overall Result	PASS		REFER	

Examiner's Name: _____

Registered No. _____

Signature (Examiner) _____

Signature (Candidate) _____

PRACTICAL TEST OF BASIC OPERATING SKILLS

E1 (Medium Level Order Picker) E2 (High Level Order Picker)

Explanation of the Fault Criteria

FAULT No.	FAULT DESCRIPTION	EXPLANATORY NOTES
1	Mounts/dismounts incorrectly	Inserts key or turns the power on before mounting, fails to use secure and appropriate hand or foot holds correctly, mounts/dismounts on the wrong side of the machine, holds steering wheel or a control lever, fails to look all round before dismounting and alights in the incorrect manner e.g. jumps off. Mounting and dismounting should be conducted facing the order picker. A penalty should be awarded each time any of these faults occur.
2	Limb/body outside confines of truck while truck in motion	Drives with a limb outside confines of the truck. Whilst it is necessary for operators to glance out occasionally so that their heads are outside the truck lines e.g. when aligning the truck or its load in a confined area etc, fingers, hands, arms legs and feet must always remain inside the confines of the machine. Where an operator has to pick outside of the confines of the order picker, the truck must be stationary with the controls in neutral and the parking brake applied and an all round visual check carried out before.
3	Fails to check all round	Fails to check all round before moving off and whilst operating. A thorough check all round is essential before moving off. Whilst manoeuvring observation of the rear end, fork and load swing and when operating the hydraulic controls e.g. raising/lowering etc. A perfunctory glance, i.e. merely 'going through the motions' is not sufficient and should result in a penalty.
4	Fails to look in direction of travel	Fails to look in the direction of travel whilst the truck is moving. Travelling with forks/load leading, this is self explanatory. When travelling with fork/load trailing, operators should be looking in the direction of travel with the occasional glance at the forks/load for possible fouling and to ensure load security.
5	Fails to use appropriate safety device	The order picker horn should be used whenever there is the requirement to warn others of the order picker presence if the operator suspects that they may not have seen or if the order picker has to pass through a blind corner or entrance. If fitted seat belts should be worn, safety devices such as presence lights, flashing beacons should all be activated.
6	Fails to check that cage guard rails/gate are closed before moving truck	If the operator tries to engage drive to move the truck before ensuring that the guard rails are not fully closed.

FAULT No.	FAULT DESCRIPTION	EXPLANATORY NOTES
7	Travels in wrong direction	Selects wrong direction control and moves under power before correcting.
8	Brakes harshly/erratically	Emergency type braking where it is not, necessary.
9	Fails to release parking brake	Attempts to move the truck without releasing the parking brake in either direction. This will not apply on order picker types that have 'auto release' type parking brakes.
10	Misuses Presence Pedal	Uses the foot brake to control speed, or misuses presence pedal to stop the truck.
11	Operates hydraulic controls when moving (except where permitted)	Whenever the hydraulic controls are operated the order picker is to be placed in a secure state i.e. parking brake applied and in neutral. Where the configuration of the order picker does not facilitate neutral no penalties are to be awarded. Penalties are to be awarded for any adjustment of the hydraulic controls whilst the truck is in motion. Permitted use of hydraulic controls while truck is in motion, should only apply to order pickers that allow the use of transverse lifting (Diagonal travel) as described in the manufactures operating manual)
12	Selects wrong hydraulic control	Selects and operates wrong hydraulic function [operates wrong lever or operates lever in wrong direction]. Fault to be recorded whenever the hydraulic pump motor is energised or mechanical movement of the cab/fork occurs.
13	Excessive use of hydraulic controls	Operators should not be penalised for failing to judge correct height of fork tips at first attempt during picking/ depositing operations. One adjustment is allowed per operation, but where more than one adjustment is made i.e. either by lowering or raising the fork's etc. faults should be recorded for each additional adjustment at each operation. Only record adjustments when movement actually occurs. Penalties are to be awarded where a candidate operates more than one hydraulic control simultaneously (paddling the controls).
14	Rough use of hydraulic controls	Uses hydraulic controls roughly or unsympathetically. Harsh application, pumping with the levers and continuing to hold the lever in the engaged position (motor engaged) when the operation is complete.
15	Fails to engage on guidance system	Where applicable the operator is unable to locate and lock onto guidance system on the first attempt.

FAULT No.	FAULT DESCRIPTION	EXPLANATORY NOTES
16	Fails to hold steering wheel/ assistor	The steering control, assistor or tiller (if fitted) must be held firmly by at least one of the operators hands whenever the truck is moving. Penalties should not be awarded if the candidate releases the steering wheel/assistor when the order picker is in a secure state i.e. park brake applied and in neutral.
17	Fork / cab too high when travelling	Fails to lower the cab to correct travelling position before moving off.
18	Fork / cab load too low when travelling	Travels or turns with forks/load below the height recommended for the truck in use, where there is a risk of the forks/load coming into contact with the ground.
19	Shunts to negotiate entry into working aisle	Any movement in the opposite direction to normal travel is a shunt and operator should be penalised for any shunts used to engage the guidance system. The instructor is at allow for a single shunt, before penalising the candidate
20	Incorrect travelling height	While manoeuvring the truck outside of the aisle the forks/ cab must be the lowest possible travel position.
21	Touches guide rails or picking uprights on entry of working aisle	Makes contact with any part of the racking system when first entering the aisle, excluding engaging the guide rails with the use of the locating wheels.
22	Touches course/racking/load	Touches any part of the course. To be interpreted as making contact with any part of the truck/load, however slight between sides of chicane or the working aisle, racking uprights or beams, adjacent stacks or supporting stacks.
23	Shunts in chicane	Shunts to negotiate chicane. A 'shunt' occurs when the operator's progress through the chicane is interrupted by the truck being manoeuvred in both directions in order to assist in alignment. A fault should be recorded for each shunt, regardless of distance travelled in opposite direction to that of the overall manoeuvre.
24	Fails to apply parking brake	Fails to apply parking brake when truck is no longer in motion. Where the order picker has automatic parking brakes or the configuration of the order picker does not facilitate neutral, no penalties are to be awarded. The order picker manufacturers hand book should be consulted for specific instructions on operating procedure.
25	Fork arms not central under load	Fork arms more than 40mm off centre when lifted. This fault can only be recorded when the operator actually engages the load by lifting it off the floor.
26	Fork arms rubbing (entry/withdrawl)	Wooden pallets: this refers to the forks rubbing against the top or bottom deck, fouling the dividing timbers or blocks.
27	Fork arms not fully inserted	Load not housed as close as possible against the heel of both fork arms.



FAULT No.	FAULT DESCRIPTION	EXPLANATORY NOTES
28	Incorrect picking position	The operator does not arrive to the correct level to safely enable them to pick or deposit the load, causing them to over reach.
29	Load incorrectly stacked	The load deposited by hand is not safely stacked and/or overhangs the confines of the racking.
30	Fails to apply parking brake/engage neutral	When preparing the order picker for parking, the park brake and neutral must be applied. Where the order picker has automatic parking brakes or the configuration of the order picker does not facilitate neutral, no penalties are to be awarded. The order picker manufacturer's hand book should be consulted for specific instructions on operating procedure.
31	Fails to lower fork arm/cab	As far as reasonably practicable, the forks/cab should be lowered until full ground contact has been made with the forks.
32	Fails to switch off /remove key	This must be completed before the operator dismounts. Penalty to be awarded in full if the operator switches off but fails to remove the key. Where key card or other electronic control systems are in use the order picker must be shut down in accordance with the manufacturer's instructions prior to the operator dismounting.
33	Wheels not straight	Fails to leave wheels in a straight ahead position.

ASSOCIATED KNOWLEDGE TEST MARKING SHEET

E1 (Medium Level Order Picker) E2 (High Level Order Picker)

Organisation question paper reference number:		Test date:	
Candidate Name:			

Question	Theory Test Paper No:	Mark
1		/4
2		/4
3		/4
4		/4
5		/4

	A	B	C	D		A	B	C	D
6 (MQ)					16				
7 (MQ)					17				
8 (MQ)					18				
9 (MQ)					19				
10 (MQ)					20				
11					21				
12					22				
13					23				
14					24				
15					25				

Minimum pass mark: 80%

Percentage Score:		Pass:		Refer:	
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Mandatory questions answered correctly?

Yes:		No:	
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Candidate signature:	
Examiner name:	
Examiner signature:	

