



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.

16 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
- Audible Warnings
- Safety Gates
- Rated Capacity Plate
- Hydraulic Controls
- Presence Pedal/Switch
- Wheels/Tyres
- Drive & Braking
- Steering
- Emergency Lowering Procedure

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	RATED CAPACITY PLATE		
12	GUIDANCE SYSTEM		
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	RATED CAPACITY PLATE (MC)		
12	GUIDANCE SYSTEM		
13	OPERATING POSITION		
14	STARTING PROCEDURE		
15	LIGHTS		
16	AUDIBLE WARNINGS (MC)		
17	EMERGENCY LOWERING PROCEDURE (MC)		
18	HYDRAULIC CONTROLS (MC)		
19	PRESENCE PEDAL/SWITCH (MC)		
20	DRIVE AND BRAKING (MC)		
21	STEERING (MC)		
22	FAULT REPORTING PROCEDURE		

<b>Candidate Result</b>	<b>PASS</b>		<b>REFERRED</b>	
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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
- Audible Warning
- Emergency Lowering Procedure

No.	CRITERIA	EXPLANATORY NOTES
1	Fork Arms/Attachment <b>Mandatory Component</b>	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 <b>Mandatory Component</b>	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 <b>Mandatory Component</b>	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 <b>Mandatory Component</b>	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.
5	Lifts Chains <b>Mandatory Component</b>	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 <b>Mandatory Component</b>	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 <b>Mandatory Component</b>	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 <b>Mandatory Component</b>	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. Individual tyres should be checked for adequate and even wear across the same axle, damage, flat spots and deep cuts, large chunks or foreign bodies such as swarf, nails, flints, etc. should be removed from the tyre. Check the tyre sidewall for evidence of deterioration and cracks.
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 <b>Mandatory Component</b>	Examine the general condition and security of the trucks safety gates. Ensure that they 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 <b>Mandatory Component</b>	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. The buckle must securely retain the belt in place and be capable of being released when under tension, check webbing is in good condition and free from splits. 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 <b>Mandatory Component</b>	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 <b>Mandatory Component</b>	Where applicable, the operator should ensure the emergency lowering access key is in its designated location and be able to describe the emergency lowering procedure relevant to their company policy.
18	Hydraulic Controls <b>Mandatory Component</b>	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 Pedal/Switch <b>Mandatory Component</b>	Check to ensure correct operation (if fitted) by activating the presence pedal or switch as per the manufacturer's handbook. Do not operate the machine if the operator presence pedal is defective.
20	Drive and Braking <b>Mandatory Component</b>	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 manufacturer's operating handbook.

No.	CRITERIA	EXPLANATORY NOTES
21	Steering <b>Mandatory Component</b>	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/platform level 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. Where a candidates' work requires it, undercutting, with appropriate de-rating, may be necessary.

## 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 theoretical 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.

Any height over 3m will be deemed High level.

**Medium Level 'C'/'C\*':** Refers to the stacking position situated between high and low level to be found within the candidates own working environment. Medium level height is a picking height range between 300mm and 2999mm.

**Low Level 'D':** Refers to the picking position at, or about, ground level. Low level refers to a picking position from the floor to a height of approx 299mm.

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.

**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/referral 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**):

Palletised locations required for the practical test (positions A,B,C,C\* , and D) must be sufficiently laden to allow for the safe collection/depositing of items.

### 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 items from position 'B'
4. Travel to position 'C' and transfer 5 items to station 'C'
5. Travel to position 'D' and collect 5 items
6. Travel to position 'B' and transfer 5 items to station 'B'
7. Reverse through the chicane to the start position
8. Drive forward through the chicane and travel to position C
9. Travel to position 'C' and collect 5 items
10. Travel to position 'D' and transfer 5 items onto station 'D'
11. Place the load squarely at low level A within 150mm of, but not touching, the vertical face
12. Withdraw the forks and reverse the truck until the fork tips are behind the start/finish line
13. Park the truck correctly
14. Dismount from the truck.

### Test procedure for E1

1. From start pick up part load at 'A'
2. Drive forwards through the chicane and stop at position 'C'
3. Raise load and collect 5 items from station 'C'
4. Travel to position 'D' and transfer 5 items to station 'D'
5. Travel to position 'C\*' and collect 5 items
6. Reverse through the chicane to the start position
7. Travel forwards through the chicane and travel to position 'C'
8. Raise the load and deposit 5 items at station 'C'
9. Travel to position 'D' and collect 5 items
10. Travel to position 'C\*' and deposit 5 items
11. Travel through the chicane forks trailing and place the part load at level A within 150mm of, but not touching the vertical face
12. Withdraw the forks and reverse the truck until the forks are behind the start finish line
13. Park and dismount 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.

## Explanation of the practical skills test result

The examiner will explain to the candidate, what faults occurred and why, time taken and the pass/refer 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/Refer 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 with safety 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

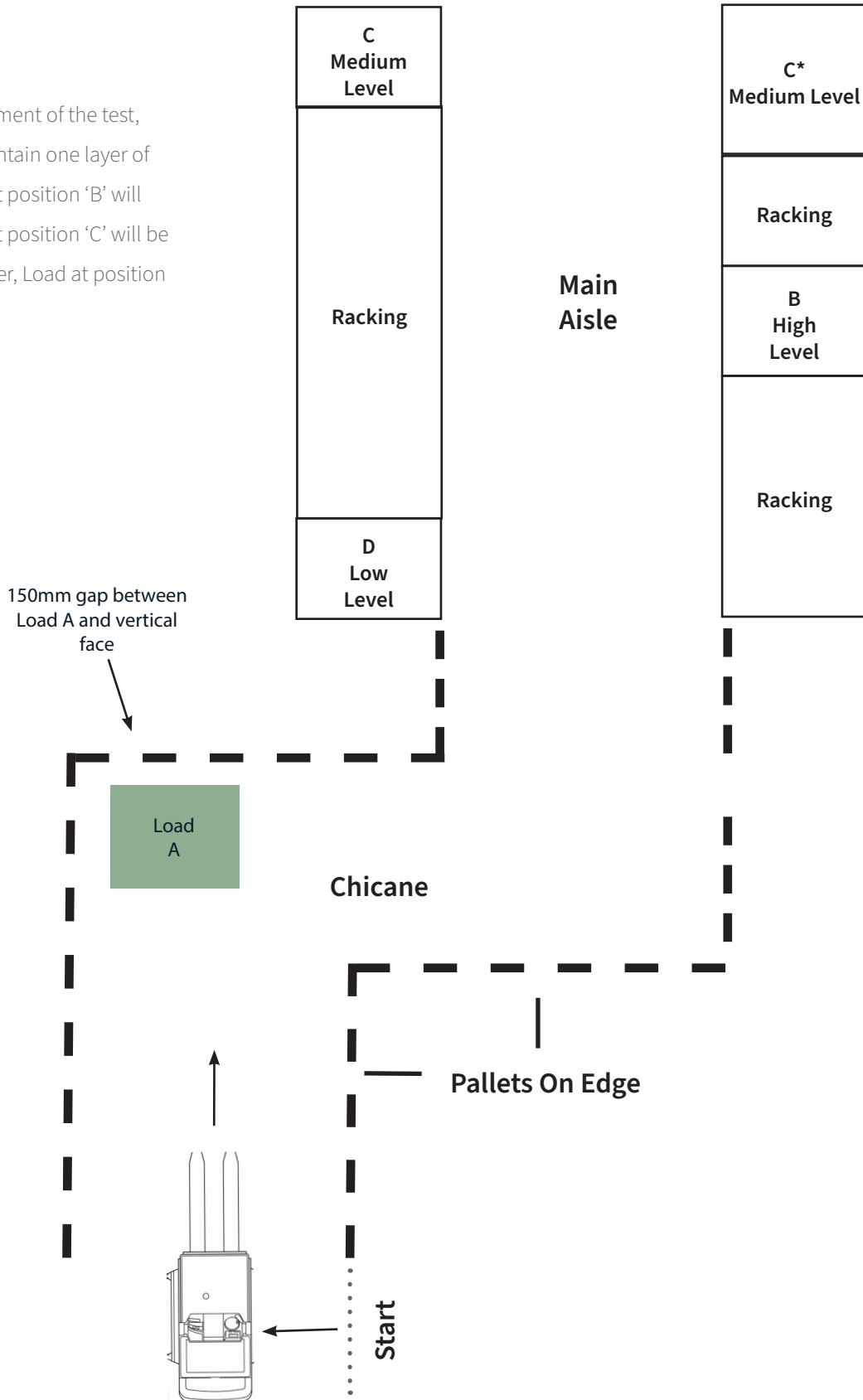
It is recognised that manual handling can be a considerable factor of the operator while picking/depositing items.

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

## PLAN OF TEST COURSE E1 (Medium Level Order Picker) E2 (High Level Order Picker) Not to Scale

**Please note**

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 E1 - Picking heights up to 3000mm

E2 - Picking heights above 3000mm

Date of Test:	Truck Type:	<b>Time</b>
Candidate Full Name:	ABA WT Category:	
	Make:	B. Start Time:
Address:	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"
	Attachment:	

**ANY ALTERATION TO THIS FORM MAY INVALIDATE TEST**

No.	Criteria observed	Faults	Penalty	Award
<b>Operator safety and observation</b>				
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	
<b>Steering and operating controls</b>				
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	

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

Examiner's Name: \_\_\_\_\_

Registered No. \_\_\_\_\_

Signature (Examiner) \_\_\_\_\_

Signature (Candidate) \_\_\_\_\_

No.	Criteria observed	Faults	Penalty	Award
<b>Manoeuvring and transporting</b>				
17	Fork arms/cab too high when travelling		5	
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*	
<b>Depositing/Picking</b>				
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	
<b>Parking</b>				
30	Fails to apply park brake/engage neutral		5	
31	Fails to lower forks arm/cab		3	
32	Fails to switch off/remove keys		3	
33	Wheels not straight		3	
			Add time penalties	
			Total penalties	

\* Allow 1 adjustment per operation

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



## 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	A penalty should be awarded when the operator drives with limb(s) outside the confines of the truck unless for aligning requirements following a suitable observational check. 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 around observation check performed.
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	A penalty should be awarded if the operator: Fails to use the order picker horn where required e.g. blind corner or at an entrance or exit to the building. Fails to turn on safety devices such as presence lights or flashing beacons. Where relevant to company policy fails to wear appropriate fall protection equipment or fails to utilise a designated safety anchor point.
6	Fails to check that cage guard rails/gate are closed before moving truck	<b>If the operator tries to engage drive to move the truck before ensuring that the guard rails are fully closed.</b>
7	Travels in wrong direction	Selects wrong direction control and moves under power before correcting.

FAULT No.	FAULT DESCRIPTION	EXPLANATORY NOTES
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	<b>Misuses Presence Pedal</b>	<b>Uses the foot brake to control speed, or misuses presence pedal to stop the truck.</b>
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	<b>Fails to engage on guidance system</b>	<b>Where applicable the operator is unable to locate and lock onto guidance system on the first attempt.</b>
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.

FAULT No.	FAULT DESCRIPTION	EXPLANATORY NOTES
17	Forks / cab too high when travelling	Fails to lower the cab to correct travelling position before moving off, whilst in the aisle.
18	Forks / cab load too low when travelling	Travels 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 to 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. The instructor is to allow for a single shunt, before penalising the candidate
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.
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.

FAULT No.	FAULT DESCRIPTION	EXPLANATORY NOTES
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 EXAMINATION

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

### 5. Theory Test

The theory test paper consists of 5 open and 20 multiple choice questions designed to establish the candidate's knowledge of the safe operating practices generally found within the industry and specific to the candidate's working environment.

A bank of open and multiple choice questions is included with this publication. The multiple choice questions are divided into 2 sections, Safety (MS) and Operational (MO).

#### 5.1 Administration

Examiners should formulate several (we would suggest 3) theory question papers from the bank of questions supplied. The questions provided within the bank of questions **are the only questions that are allowed to be used for the associated knowledge examination**. Organisations wishing to use alternative questions must have **prior approval from the ABA**. The theory questions chosen will consist of 5 open questions, 10 Safety (MS) questions and 10 Operational (MO) questions.

##### Mandatory Questions

In the bank of multiple choice questions there are 5 that are in bold type. These are mandatory questions that must appear in every question paper. If a candidate gets any of the mandatory questions incorrect then the overall result of the associated knowledge examination will be a referral (regardless of the overall score).

Ideally, 20 questions should apply to all sectors of industry and, where practicable, 5 questions specific to the candidate's working environment.

By logical selection from the batches, a varied stock of test papers may be assembled, each of these must be allocated an appropriate identification (paper number), which must be recorded on the candidate's answer sheet and final assessment document by the examiner for future reference.

Where it has been determined that English is not their first language or the candidate experiences literacy and numeracy difficulties then the candidate may take the test orally. See notes on testing non English speaking candidates in the introduction section of this document.

The examiner must then pose the questions on an individual candidate basis and all answers must be documented and recorded on the final assessment document for future reference.

## 5.2 Marking

The minimum mark of **80%** is required to achieve a pass in the test.

Each **open** question is worth up to a maximum of 4 marks in proportion to the accuracy of the answer given i.e. if a question asks the candidate to name 4 items and the candidate only provides 3 answers that the examiner is satisfied with, then only 3 marks will be awarded, alternatively if only one answer is provided that satisfies the examiner then only 1 mark would be awarded.

Each multiple choice question is worth 4 marks for a correct answer and 0 for an incorrect answer, **proportional marking for multiple choice questions is not permitted.**

Errors must be explained to the candidate.

Examiners should accept suitable and appropriate answers should a candidate provide an answer for an open question that is not in the list of model answers provided

Candidates who do not pass the test should undergo the appropriate remedial tuition and at a later time re-take a new batch of 25 questions.

## 5.3 Conduct of Theory Test

This consists of 3 sets of questions:

- 5 open questions which will normally be presented in written form (or presented orally by the instructor/examiner if the candidate needs, this can be dictated).
- 10 multiple choice questions on Safety which will normally be presented in written form and requires the candidate to select the correct answer by ticking a box.
- 10 multiple choice questions on Operational matters which will normally be presented in written form and requires the candidate to select the correct answer by ticking a box.

**TOTAL: 25 Questions**

Each question in each set is worth a maximum of 4 marks making a total of 100 marks available.

### Open Questions (O)

From the bank of questions supplied, the instructor/examiner selects 5.

Each of these can be presented orally or in written form.

Marking will be proportional to the answers given up to the maximum of 4 marks per question.

\*Question 5, only contains 3 possible answers, however should be scored as follows:

3 correct answers = 4 points

2 correct answers = 2 points

1 correct answer = 1 point

### Safety Multiple Choice Questions (MS)

From the bank of safety questions the instructor/examiner selects 10 questions which ideally are related to the candidate's operational requirements and again these can be presented in written or oral form.

Each answer is worth either **4** marks for being correct or nothing. Proportional marking for multiple choice questions is not permitted.

### Operational Multiple Choice Questions (MO)

From the bank of operational questions the instructor/examiner selects 10 questions which ideally are related to the candidate's operational requirements. These again can be presented in written or oral form.

Each answer is worth either **4** marks or nothing. Proportional marking for multiple choice questions is not permitted.

### Administration

The questions used from each set and the subsequent marks awarded are to be recorded on the candidates answer sheet and final assessment document by the examiner for future reference.

# 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:	