



Rider Operated Very Narrow Aisle Lift Truck  
(Lateral and front stacking, operator up/operator down) (ABA  
Categories F1 &F2)  
**BASIC OPERATING SKILLS TEST**

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



## **BASIC OPERATING SKILLS TEST**

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## BASIC OPERATING SKILLS TEST

Rider Operated Very Narrow Aisle Lift Truck (Lateral and front stacking, operator up/operator down) (ABA Categories F1 &F2)

### 1. Introduction

This test has been developed and adopted by the Accrediting Bodies Association for Workplace Transport (ABA) as of 01.11.2021 for implementation no later than 01.03.2022 as a means of ensuring national, uniform standards for the testing of ABA categories F1/F2 lateral and front stacking trucks - operator up/operator down truck operators. **Only instructors and examiners who have been trained in its application should carry out this testing process.**

Continuous assessment of operators' progression will naturally be undertaken during training by instructors and subsequently by immediate supervisors at the operators' workplace. 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 & Safety Executive Approved Code of Practice (ACoP) and supplementary guidance "Rider-operated lift trucks: operator training". The ACoP and guidance gives advice to employers on lift truck operator training and testing. Job specific and familiarisation training should follow successful completion of basic operator 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 ability
- 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 customer 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 auditing 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. Any evidence of material changes or assistance being made by the translator to benefit a trainee's response will invalidate the test and lead to revocation of any certificate or registration awarded. Additionally, sanctions against the instructor/examiner and the training provider may also be actioned.

## TEST OBJECTIVES

Rider Operated Very Narrow Aisle Lift Truck (Lateral and front stacking, operator up/operator down) (ABA Categories F1 &F2)

### 2. Test Objectives

The overall objective of this formal, predetermined and validated test is to verify the candidate's ability to meet the 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 making the appropriate report/taking remedial action (see explanation of fault criteria pages 9-13).
- b. Undertake a **practical test**:
  - Manoeuvring a laden and unladen lift truck, forwards and reverse
  - Carrying out a series of stacking and de-stacking exercises within very narrow aisles
  - Manoeuvring twice in each direction, laden, negotiating a chicane
  - Culminating in depositing a load and parking the lift truck correctly (see practical test of basic operating skills pages 14-16)
- c. Undertake an **associated knowledge test**, written or oral (see section 5).

## PRE-USE INSPECTION

Rider Operated Very Narrow Aisle Lift Truck (Lateral and front stacking, operator up/operator down) (ABA Categories F1 & F2)

### 3. Pre-use Inspection

The candidate will be required to perform a pre-use inspection, and clearly demonstrate understanding of it. The pre-use inspection is a visual and functional safety check. It must be carried out in accordance with the relevant lift truck 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.

17 of the 23 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 within the location of the lift truck. The following lists of components are deemed as mandatory inspections and the candidate is required to perform a full and correct inspection of these items. Failure to do so will result in an automatic referral in this examination.

- Fork Arms/Attachment
- Carriage Plate
- Traverse Plate and Turret
- Mast
- Mast Rollers/Slides
- Lift Chains
- Chain Pulleys
- Hydraulics
- Wheels/Tyres
- Safety Gates
- Rated Capacity Plate
- Audible Warnings
- Hydraulic Controls
- Presence Pedal
- Drive & Braking
- Steering
- Emergency Lowering Procedure/Equipment

The remaining elements listed on the pre-use inspection sheet are still required to be appropriately inspected, and the examiner will decide if the overall inspection was adequate or not and should 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 performed in accordance with the lift truck manufacturer's recommendations.

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

## PRE-USE INSPECTION SHEET

Rider Operated Very Narrow Aisle Lift Truck (Lateral and front stacking, operator up/operator down) (ABA Categories F1 &F2)

### Operator Use

| No. | ITEM                                       | CHECK COMPLETED | NOT APPLICABLE |
|-----|--|-----------------|----------------|
| 1   | FORK ARMS/ATTACHMENT                       |                 |                |
| 2   | CARRIAGE PLATE                             |                 |                |
| 3   | TRAVERSE PLATE & TURRET                    |                 |                |
| 4   | MAST                                       |                 |                |
| 5   | MAST ROLLERS/SLIDES                        |                 |                |
| 6   | LIFT CHAINS                                |                 |                |
| 7   | CHAIN PULLEYS                              |                 |                |
| 8   | HYDRAULICS                                 |                 |                |
| 9   | WHEELS/TYRES                               |                 |                |
| 10  | GUIDANCE SYSTEM                            |                 |                |
| 11  | EXTERNAL CONDITION                         |                 |                |
| 12  | SAFETY GATES                               |                 |                |
| 13  | RATED CAPACITY PLATE                       |                 |                |
| 14  | OPERATING POSITION                         |                 |                |
| 15  | OPERATORS SEAT                             |                 |                |
| 16  | STARTING PROCEDURE                         |                 |                |
| 17  | LIGHTS                                     |                 |                |
| 18  | AUDIBLE WARNINGS                           |                 |                |
| 19  | EMERGENCY LOWERING PROCEDURE/<br>EQUIPMENT |                 |                |
| 20  | HYDRAULIC CONTROLS                         |                 |                |
| 21  | PRESENCE PEDAL                             |                 |                |
| 22  | DRIVE AND BRAKING                          |                 |                |
| 23  | STEERING                                   |                 |                |

All pre-use inspections must be carried out in accordance with the specific instructions published in the relevant manufacturers operating handbook



## PRE-USE INSPECTION SHEET

Rider Operated Very Narrow Aisle Lift Truck (Lateral and front stacking, operator up/operator down) (ABA Categories F1 & F2)

### Examiner/Instructor Use

|                                    |              |
|------------------------------------|--------------|
| Candidate Name:                    | Test Date:   |
| Very Narrow Aisle Lift Truck Type: | Model:       |
| Make:                              | Motive Power |

| No. | ITEM   | CHECK COMPLETED | NOT APPLICABLE |
|-----|--|-----------------|----------------|
| 1   | FORK ARMS/ATTACHMENT (MC)                    |                 |                |
| 2   | CARRIAGE PLATE (MC)                          |                 |                |
| 3   | TRAVERSE PLATE & TURRET (MC)                 |                 |                |
| 4   | MAST (MC)                                    |                 |                |
| 5   | MAST ROLLERS/SLIDES (MC)                     |                 |                |
| 6   | LIFT CHAINS (MC)                             |                 |                |
| 7   | CHAIN PULLEYS (MC)                           |                 |                |
| 8   | HYDRAULICS (MC)                              |                 |                |
| 9   | WHEELS/TYRES (MC)                            |                 |                |
| 10  | GUIDANCE SYSTEM                              |                 |                |
| 11  | EXTERNAL CONDITION                           |                 |                |
| 12  | SAFETY GATES (MC)                            |                 |                |
| 13  | RATED CAPACITY PLATE (MC)                    |                 |                |
| 14  | OPERATING POSITION                           |                 |                |
| 15  | OPERATORS SEAT                               |                 |                |
| 16  | STARTING PROCEDURE – ELECTRIC TRUCKS         |                 |                |
| 17  | LIGHTS                                       |                 |                |
| 18  | AUDIBLE WARNINGS (MC)                        |                 |                |
| 19  | EMERGENCY LOWERING PROCEDURE/ EQUIPMENT (MC) |                 |                |
| 20  | HYDRAULIC CONTROLS (MC)                      |                 |                |
| 21  | PRESENCE PEDAL (MC)                          |                 |                |
| 22  | DRIVE AND BRAKING (MC)                       |                 |                |
| 23  | STEERING (MC)                                |                 |                |
| 23  | FAULT REPORTING PROCEDURE                    |                 |                |

|                  |      |  |          |  |
|------------------|------|--|----------|--|
| Candidate Result | PASS |  | REFERRED |  |
|------------------|------|--|----------|--|

|                                |
|--------------------------------|
| Candidate Signature:           |
| Examiners Name:                |
| Examiners Signature:           |
| Examiners Registration Number: |

All Pre-Use inspections 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

Rider Operated Very Narrow Aisle Lift Truck (Lateral and front stacking, operator up/operator down) (ABA Categories F1 &F2)

### Explanation of the Pre-Use Inspection

The candidate will be observed carrying out the pre-use inspection. At periodic planned stages, the instructor/examiner will pause 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 candidate must fully and comprehensively understand the following lists of items. Failure to do so will result in an automatic referral.

- Fork Arms/Attachment
- Safety Gates
- Carriage Plate
- Rated Capacity Plate
- Traverse Plate and Turret
- Audible Warnings
- Mast
- Hydraulic Controls
- Mast Rollers/Slides
- Presence Pedal/Switch
- Lift Chains
- Drive & Braking
- Chain Pulleys
- Steering
- Hydraulics
- Emergency Lowering Procedure/Equipment
- Wheels/Tyres

| No. | CRITERIA  | EXPLANATORY NOTES   |
|-----|---|---|
| 1   | Fork Arms/Attachment<br><b>Mandatory Component</b>    | <p>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.</p> <p>Any attachment fitted must be attached appropriately and secure on the carriage plate (if applicable). Locking pins, welded joints, and 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.</p> |
| 2   | Carriage Plate<br><b>Mandatory Component</b>          | <p>The carriage plate should have no obvious damage and sit square to the mast. Welded end stops must be in good condition and prevent the forks from accidental release from the carriage plate, center stop bolts must be fitted and secure. The fork locking pins must fully engage into the castellation and the plate should be free from debris. Interlocks should be inspected for visual signs of damage.</p>   |
| 3   | Traverse Plate & Turret<br><b>Mandatory Component</b> | <p>The traverse rack and pinion/turret slide must be free from debris and must allow for smooth travel throughout the full width of the truck. It must also be examined for obvious damage or distortion, there should be no loose nuts, bolts, hydraulic leaks, and evidence of bare electrical wires and the plate should be free from debris. Rollers / fork arm rotating cylinders are to be inspected for undue wear, scoring, excessive dirt or any foreign bodies that may be fouling the mechanism.</p>   |
| 4   | Mast<br><b>Mandatory Component</b>                    | <p>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 that may be fouling the mechanism. The mast support bars/tension struts must also be checked for damaged such as cracks and distortion.</p>   |
| 5   | Mast Rollers/Slides<br><b>Mandatory Component</b>     | <p>The mast guide rollers, including reach channel rollers must not show signs of uneven wear, incorrect tracking, flat spots and scoring. Mast slides must be intact and not loose.</p>  |
| 6   | Lift Chains<br><b>Mandatory Component</b>             | <p>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.</p> <p>Chain anchor points must be inspected for damage, even adjustment and security of the locking nuts/devices.</p>  |
| 7   | Chain Pulleys<br><b>Mandatory Component</b>           | <p>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 inner walls of the pulley flanges.</p>  |

| No. | CRITERIA   | EXPLANATORY NOTES   |
|-----|--|---|
| 8   | Hydraulics<br><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 that 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.  |
| 9   | Wheels & Tyres<br><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 and steering assembly 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. Visual checks should include damage, flat spots and deep cuts. Large chunks or foreign bodies such as swarf, nails, flints, etc. Should be removed from the tyre.   |
| 10  | Safety Gates<br><b>Mandatory Component</b>         | Examine the general condition of the truck's safety gates for damage and ensure they are intact and open and close securely. If proximity sensors/interlocks are fitted these should be checked to ensure they are fully functional.  |
| 11  | Guidance System                                    | Wire guidance systems should be checked to ensure the function activates on the lift truck and that no fault/error codes are present. If the machine is using rail guidance wheels/tyres, ensure that they are in good working order.   |
| 12  | Rated Capacity Plate<br><b>Mandatory Component</b> | The rated capacity plate must be fitted; it must be secure, legible and clearly display the maximum weight the lift truck can pick up, the load centre and the maximum lift height appropriate to the lift truck and/or any attachments fitted.   |
| 13  | External Condition<br><b>Mandatory Component</b>   | Examine the general condition and security of the machine's overhead guard, battery and motor covers. Doors and panels should be complete, damage free and secure. Inspect the bodywork for damage, rust, broken hinges or locks or damaged battery access panels etc. that could be detrimental to the truck's safe operation. Windscreens, 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 that may have been left there which could fall when the truck is operated. In addition, the operator should ensure there are no water, oil or any other type of fluid leaks. Wheel guards or covers must not be in contact with the tyres. |

| No. | CRITERIA   | EXPLANATORY NOTES   |
|-----|--|---|
| 14  | Operating Position   | The floor and cockpit area should be dry and clear of dirt or any foreign bodies that 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.  |
| 15  | Operator's Seat  | Check anchor points, runners/slides and end stops are engaged, secure and undamaged. Ensure that under the seat is clear of any foreign bodies which may be fouling the adjusters and any safety interlock switches and weight function indicators are fully functional. Inspect the operator's seat restraint [if fitted] 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 backrest adjusters to ensure they are intact, damage free and functional. |
| 16  | Starting Procedure   | Check that the traction battery is secure, locked in place 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 fully functional in accordance with the specific manufacturer's operating handbook.   |
| 17  | 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.   |
| 18  | Audible Warning Devices<br><b>Mandatory Component</b>                  | The machine must not be operated if the horn is defective. If there is an audible warning device ensure 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 or leave a safety gate open etc.   |
| 19  | Emergency Lowering Procedure / equipment<br><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. The emergency equipment seal should be checked to ensure it is fully intact and that the equipment is within the detailed expiry date.  |
| 20  | Hydraulic Controls<br><b>Mandatory Component</b>                       | All hydraulic driven parts (mast height and reach/traverse carriage etc.) must be run to their end positions to fully lubricate all the moving parts, check for their serviceability, smooth operation, obvious leaks and that there is sufficient oil in the tank.   |

| No. | CRITERIA  | EXPLANATORY NOTES   |
|-----|---|---|
| 21  | Presence Pedal/Switch<br><b>Mandatory Component</b> | Check to ensure correct operation 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.  |
| 22  | Drive and Braking<br><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 to ensure it holds the truck under power. The efficiency of the foot brake should be tested in both directions to ensure braking is even. There should not be excess play in the operation of the brake pedal. Some trucks 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. |
| 23  | Steering<br><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 to avoid unnecessary wear or strain to the steering mechanism and tyres. The operator should move the truck in both directions to check the steering operates fully on both locks. 180 and 360-degree steering systems should function correctly and any steering instruments/indicators should correlate to the wheel position.  |
| 24  | Fault Reporting Procedure                           | 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. and completion of documentation.   |

Note:

- a. The pre-use inspection information provided has been determined as the minimum number of items to be checked on a very narrow aisle (lateral and front stacking trucks - operator up/operator down) truck before operation and is not definitive.
- b. All pre-use and attachment inspections must be carried out in accordance with the specific instructions published in the manufacturer's 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 form part of the ABA testing criteria, however it is strongly advised that if these items are being used, then relevant inspections are performed prior to the commencement of the course.

## PRACTICAL TEST OF BASIC OPERATING SKILLS

Rider Operated Very Narrow Aisle Lift Truck (Lateral and front stacking, operator up/operator down) (ABA Categories F1 &F2)

### 4. Practical Test of Basic Operating Skills

This test has been devised to examine the critical skills required of a very narrow aisle lift truck operator, these are:

- Mounting, dismounting and parking a truck
- Starting and stopping the truck
- Driving forwards and in reverse, including braking
- Steering accurately
- Using hydraulic controls correctly and sympathetically
- Lifting and travelling with a load
- Judging the position of fork tips at varying heights
- Stacking and de-stacking accurately at various heights
- Observing the working environment and judging 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, whilst being easily constructed on most company premises.

#### 4.1 Setting up the Practical Test Course

It will be noticed that upon completion, the test course will have been returned to its original state and be ready for use without re-arrangement.

##### Test Course Materials

The course has been designed to take advantage of existing pallets, loads, stacks, racking or other permanent constructions, subject to critical dimensions and machine type. All loads handled by the lift truck during the test should be of identical width, height, length and weight to simulate realistically the candidates' 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 consists 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 plans 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, other materials that 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 to achieve an efficient entry into the aisle.

**Note: If using empty pallets, care must be taken to ensure the pallets are secure 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 truck plus a clearance of 50-75mm 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 minimum stacking aisle width for that particular truck and load using the appropriate guidance system.

Loads along the main aisle should be stacked or racked in line at the appropriate levels with 75mm spacing between the loads or the racking uprights where applicable.

## Stacking Heights

On completion of the test the candidate will have stacked and de-stacked at high, medium and low levels.

**Load at 'A':** The height of the load is not critical but should be high enough to obscure the candidate's vision, thus requiring them to make restricted judgements of positioning while negotiating the chicane, during stacking and de-stacking operations in the main aisle and when depositing the load at the vertical face.



The part of the course forming the vertical face should be of sufficient height and width to permit the candidate to the approach load leading.

The first load at 'A' should be positioned squarely within 150mm of, but not touching, the vertical face.

**High Level at 'B':** Refers to the maximum stacking height normally to be found in a candidate's working environment for the particular truck and loads in use on the test. High level is a minimum of 3m (3000mm) and above.

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

**Low level at 'D':** Refers to the stacking position at, or about, ground level. Low level refers to a height of 299mm or below.

**Note: The existing racking levels used should correspond as closely as possible to the levels described above.**

## 4.2 Alternative Test Construction

Every effort should be made to construct the course in one continuous area as shown in the test course layout, 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 de-stacking the pallet from the vertical face, negotiating the chicane load leading and then load trailing twice, depositing the load close to the vertical face and finally parking the truck at the finish line.

### Part 2.

Covering the various stacking and de-stacking operations will start at the point where the candidate would have exited the chicane load leading. The test will terminate prior to the point where the candidate would have entered the chicane load trailing.

## 4.3 Administration and Testing Procedures

### Duration of the Test

Candidates are tested on their ability to operate correctly and skilfully and without undue slowness, hesitancy or excessive speed. Examiners should therefore determine a fair and reasonable time to complete the test.

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

The examiner should carry out the complete test at a normal working pace and record 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 should 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 should ensure that the:

- Candidate is put at ease
- Lift truck is correctly parked, in a secure state at a distance from the first load that requires the lift truck 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
- Test allocated time is clearly stated

### Walk through the test course

The examiner should 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 assess their ability to retain the instructions.

## Explanation of the marking sheet

The examiner should clearly explain how the marking system works, why some faults are more heavily weighted than others, the areas of disqualification and the pass/referral/cut off criteria.

The examiner should direct the candidate through the course providing step-by-step instructions of the operations to be performed.

During the practical skills test the examiner should maintain a safe position where they can continuously observe the candidate without causing a distraction or hazard.

## Practical Skills Test Course F1 & F2

This practical skills test should be carried out as follows:

1. The candidate should mount the truck at the start position and utilise any relevant safety equipment
2. Drive forward and pick up the load at low level 'A', reverse back to the start/finish line then stop and rotate the load in preparation for deposit on the right-hand side of the aisle
3. Negotiate the chicane with load leading
4. Stack the load at high level 'B' left-hand side of the aisle
5. Withdraw from the load and reverse with fork arms trailing towards the chicane
6. De-stack the load from medium level position 'C' on the right-hand side of the aisle
7. Reverse with the load trailing towards the chicane
8. Stack the load at low level 'D' squarely and in line with the adjacent load on the -hand side of the aisle
9. Withdraw from the load and reverse with the fork arms trailing towards the chicane
10. De-stack the load from high level 'B' on the left-hand side of the aisle
11. Withdraw from the load and reverse with the load trailing from the main aisle and negotiate the chicane to the start/finish line then stop and rotate the load in preparation for deposit on the left-hand side of the aisle
12. Drive forward load leading and negotiate the chicane into the main aisle and stack the load at medium level 'C' on the right-hand side of the aisle
13. Withdraw from the load and reverse with the fork arms trailing towards the chicane
14. De-stack the load at low level 'D' on the left-hand side of the aisle
15. Reverse with the load trailing from the main aisle and negotiate the chicane to the start/finish line
16. Place the load squarely at low level 'A' within 150mm but not touching the vertical face

17. Withdraw from the load and reverse the truck until the fork tips are behind the start/finish line
18. Correctly park the truck and remove the key
19. Dismount the truck correctly

Explanation of the practical skills test result:

Following the completion of the test the examiner will explain to the candidate:

- What faults occurred and why
- Time taken and the pass/referral result
- Where appropriate, provide constructive advice and outline any recommendations.

**Note: The test course layout has been designed and validated to ensure the test can be completed from within the confines of a lift truck. Therefore, candidates should be discouraged from dismounting from the truck during free roaming sections of the test unless precipitated by a potentially dangerous or hazardous occurrence.**

## 4.4 Marking

Practical test scoring and timing of the test should start when the candidate mounts the truck and will finish after they have dismounted on completion of the test.

It is important that faults are recorded carefully, as they occur during the test. The Practical skills 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).

On each occasion when a candidate commits a fault, a cross 'x' should be marked against the appropriate fault. At the end of the test 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 three 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 result in a referral.

## 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 candidates' 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 **set time**. Time lost through interruption of the test will not incur penalties.

The maximum time allowed before disqualification will be 3 times rehearsed time.

Example:

Rehearsed time = 15 minutes (examiner's time)

Set time = 30 minutes (twice rehearsed time)

Disqualification time = 45 minutes (three times rehearsed time)

**The practical test of basic operating skills is not only designed to ensure candidates demonstrate safe very narrow aisle lift truck 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) the examiner should consider referring the candidate.**

## Pass/referral Criteria

The cut-off for the practical skills test is **40** penalty points. Where penalties are incurred in excess of this figure the candidate will be referred.

In addition, the candidate will be disqualified for:

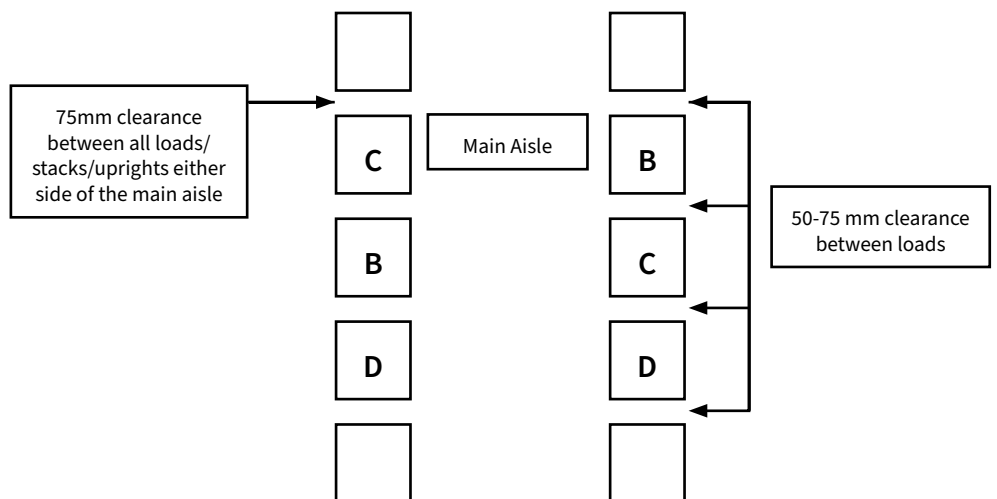
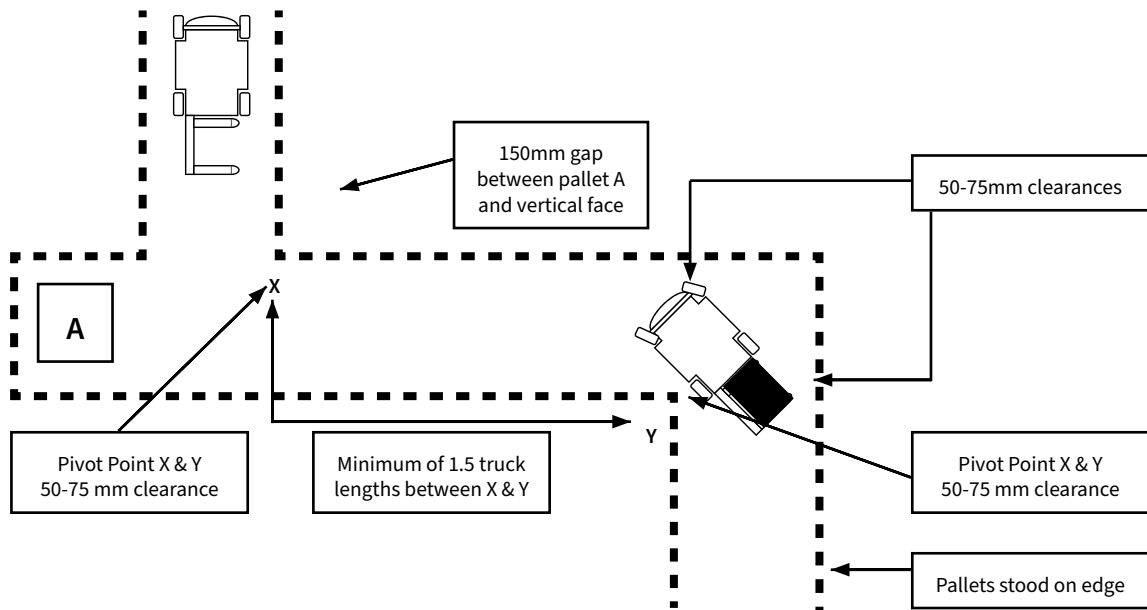
- **Unsafe Stacking:** Where examiners observe a load or stack is to be left in a potentially unsafe state, they should act immediately to overcome the problem and disqualify the candidate
- **Violent Collision:** Where the candidate allows any part of the lift truck or load to violently strike any part of the course
- **Exceeds maximum time:** Where the candidate exceeds the maximum time set by the examiner
- **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**
- **Dismounts Unnecessarily:** Where the candidate dismounts the truck other than in an emergency or at the end of the test, this will result in a disqualification

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

## Rider Operated Very Narrow Aisle Lift Truck

(Lateral and front stacking, operator up/operator down) (ABA Categories F1 & F2)

**(Plan Not to Scale)**



|                        |  |
|------------------------|--|
| Training Organisation: | <b>PRACTICAL TEST OF BASIC OPERATING SKILLS</b><br>Very Narrow Aisle Stacking Trucks ABA Categories F1 & F2<br><br><b>STANDARD MAX PENALTY POINTS ALLOWED</b><br>40 points |
|------------------------|--|

|                      |                           |   |  |
|----------------------|---------------------------|---|--|
| Date of Test:        | Truck Type:               | <b>Time</b>   |  |
| 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 |  |
|                      | Lift Height Used In Test: | 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 |
|--|---|--------|---------|-------|
| <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 carry out entry/exit safety procedures |        | 5       |       |
| <b>Steering and operating controls</b> |   |        |         |       |
| 7                                      | Fails to centralise forks/carriage              |        | 5       |       |
| 8                                      | Travels in wrong direction                      |        | 5       |       |
| 9                                      | Brakes harshly/erratically                      |        | 3       |       |
| 10                                     | Fails to release parking brake                  |        | 1       |       |
| 11                                     | Rides foot brake                                |        | 1       |       |
| 12                                     | Operates hydraulic controls when moving         |        | 5       |       |
| 13                                     | Selects wrong hydraulic control                 |        | 3       |       |
| 14                                     | Excessive use of hydraulic controls             |        | 1*      |       |
| 15                                     | Rough use of hydraulic controls                 |        | 3       |       |
| 16                                     | Fails to hold steering wheel when moving***     |        | 5       |       |
| <b>Manoeuvring and transporting</b>    |   |        |         |       |
| 17                                     | Heavy contact with guard rails or uprights      |        | 5       |       |
| 18                                     | Touches course/racking/load                     |        | 5       |       |
| 19                                     | Shunts in chicane                               |        | 3*      |       |
| 20                                     | Load/cab too low when travelling                |        | 5**     |       |
| 21                                     | Load/cab too high when travelling               |        | 5**     |       |

| No.   | Criteria observed   | Faults | Penalty | Award              |
|---|---|--------|---------|--------------------|
| <b>Stacking/De-stacking</b>                         |   |        |         |                    |
| 22  | Shunts to negotiate entry into working aisle                |        | 3*      |                    |
| 23  | Wheels not straight during aisle travel                     |        | 3       |                    |
| 24  | Shunts for stacking/de-stacking                             |        | 3*      |                    |
| 25  | Fails to apply parking brake/neutral/release presence pedal |        | 5       |                    |
| 26  | Fork arms not central under load                            |        | 3**     |                    |
| 27  | Fork arms rubbing on entry or withdrawal                    |        | 3**     |                    |
| 28  | Fork tips touch stack/load                                  |        | 3**     |                    |
| 29  | Fork arms not fully inserted                                |        | 3**     |                    |
| 30  | Load incorrectly stacked                                    |        | 3       |                    |
| 31  | Incorrect set down at vertical face                         |        | 1       |                    |
| <b>Lifting Lowering Transporting Automatic Mode</b> |   |        |         |                    |
| 32  | Fails to ensure truck is operating correctly                |        | 5       |                    |
| 33  | Fails to activate correct mode for travel                   |        | 3       |                    |
| 34  | Fails to input correct programme                            |        | 1***    |                    |
| <b>Parking</b>                                      |   |        |         |                    |
| 35  | Fails to apply parking brake/neutral                        |        | 5       |                    |
| 36  | Fails to lower forks arms/cab                               |        | 5**     |                    |
| 37  | Fails to switch off/remove key                              |        | 3       |                    |
| 38  | Wheels not straight   |        | 3       |                    |
|   |   |        |         | Add time penalties |
|   |   |        |         | Total Penalties    |

\* Allow 1 adjustment per operation  
 \*\* The phrase 'fork arms' could include attachments, if applicable  
 \*\*\* Where applicable

| 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                            |  | Unsafe stacking                                |

|                      |      |       |
|----------------------|------|-------|
| 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 BASIC OPERATING SKILLS

Rider Operated Very Narrow Aisle Lift Truck (Lateral and front stacking, operator up/operator down) (ABA Categories F1 & F2)

### Operator Safety & Observation

| No. | CRITERIA  | 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             | Drives with limb outside the confines of the truck unless for aligning requirements following a suitable observational check.   |
| 3   | Fails to check all round                        | Fails to check all round before moving on 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 forks/load trailing operators should be looking in the direction of travel with the occasional glance at the fork/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 lift truck horn whenever there is the requirement to warn others of the lift truck presence e.g. blind corners or entrance or exit to a building, on entry or exit from the stacking aisle. Safety devices such as presence lights, flashing beacons should all be activated. Safety rails and bars should be correctly deployed and locked into the correct position. Where applicable, Appropriate fall protection equipment should be worn and an appropriate safety anchor point used. |
| 6   | Fails to carry out entry/exit safety procedures | If the operator tries to engage drive to move the truck before ensuring that the guardrails are fully closed and the forks are in the home position.  |

## Steering & Operating Controls

| No. | CRITERIA                                   | EXPLANATORY NOTES  |
|-----|--|--|
| 7   | Fails to centralise forks/carriage         | Fails to return the forks/load to the home position.   |
| 8   | Travels in wrong direction                 | Unintentionally selects wrong direction control and moves under power before correcting.   |
| 9   | Brakes harshly/erratically                 | Emergency type braking where it is not necessary.  |
| 10  | Fails to release parking brake             | Attempts to move the truck without releasing the parking brake in either direction (this will not apply on lift truck types that have 'auto release' type parking brakes).   |
| 11  | Rides foot brake or misuses presence pedal | Uses the foot brake to control speed, or misuses presence pedal to stop the truck.   |
| 12  | Operates hydraulic controls when moving    | Fails to apply parking brake/neutral/secure the machine before using the hydraulic controls. (Fault not applicable during narrow aisle guided travel).   |
| 13  | Selects wrong hydraulic control            | Selects and operates the wrong hydraulic function (operates wrong lever or operates lever/switch in the wrong direction). Faults to be recorded whenever the hydraulic pump motor is energised or mechanical movement of the mast/fork occurs.   |
| 14  | Excessive use of hydraulic controls        | When the operator makes more than one adjustment with the hydraulic controls. One adjustment is allowed per operation, but where more than one adjustment is made i.e. either by lowering or raising the fork arms 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). |
| 15  | 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.  |
| 16  | Fails to hold steering wheel/assistor***   | The steering control, or assistor (if fitted) must be held firmly by at least one of the operator's hands whenever the truck is moving. Penalties should not be awarded if the candidate releases the steering control/assistor when the lift truck is in a secure state i.e. park brake applied and in neutral.   |
| 17  | Heavy contact with guard rails/uprights    | A penalty should be awarded where the truck bumps the guard rails/uprights due to incorrect alignment.   |

## Manoeuvring & Transporting

| No. | CRITERIA                          | EXPLANATORY NOTES   |
|-----|-----------------------------------|---|
| 18  | Touches Course/Racking/ Load      | Touches any part of the course. To be interpreted as making contact with any part of the truck/load/racking however slight between the sides of the chicane or the working aisle, racking uprights or beams (above and below) or adjacent stacks or supporting stacks.  |
| 19  | Shunts in chicane                 | Shunts to negotiate chicane. A shunt occurs when the operator's progress when negotiating the chicane is interrupted due to a change in direction to assist alignment. One 'shunt' is to be allowed per operation, however, where more than one adjustment is made faults should be recorded for each additional shunt, regardless of the distance travelled. |
| 20  | Load/cab too low when travelling  | Travels or turns with the fork/load/cab below the height recommended for the truck in use, where there is a risk of the forks/load/cab coming into contact with the ground.   |
| 21  | Load/cab too high when travelling | Fails to lower the fork arms/load/cab to correct travelling position before moving off.   |

## Stacking/De-stacking

| No. | CRITERIA   | EXPLANATORY NOTES  |
|-----|--|--|
| 22  | 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 examiner is to allow for a single shunt, before penalising the candidate.   |
| 23  | Wheels not straight during aisle travel                      | On completion of aisle entry, a penalty should be awarded if the wheels are out of alignment prior to aisle travel or any hydraulic functions being performed.   |
| 24  | Shunts for stacking and de-stacking                          | A penalty should be awarded when the operator takes more than one adjustment to align to the load/location. At each stacking/de-stacking operation, operators should not be penalised for failing to line up correctly on the first attempt. One 'shunt' is to be allowed per operation.   |
| 25  | Fails to apply parking brake/ neutral/release presence pedal | Fails to apply parking brake neutral when truck is no longer in motion or where applicable to manufacturers instructions fails to release the presence pedal (where applicable). Where the truck has automatic parking brakes or the configuration does not facilitate neutral, no penalties are to be awarded. The manufacturers handbook should be consulted for specific instructions on operating procedure. |

| No. | CRITERIA                               | EXPLANATORY NOTES  |
|-----|--|--|
| 26  | Fork arms not central under load       | A penalty will be awarded when the fork arms are more than 40mm off centre when the load is lifted.  |
| 27  | Fork arms rubbing on entry/ withdrawal | A penalty should be awarded when the fork arms rub against the top or bottom deck or touch the dividing timbers or blocks.   |
| 28  | Fork tips touch stack/load             | Tips of the fork arms or load make contact with pallet/rack/ stack or vertical face. This refers to the operator's weakness in judging distances between the tips of the forks and a) the leading edge of a load b) pallets, racking, stack or the vertical face (see disqualification for violent collision).   |
| 29  | Fork arms not fully inserted           | Load not housed against the heels of both fork arms (See disqualification – operates dangerously).   |
| 30  | Load incorrectly stacked               | This applies when a load has been actually deposited and the operation completed. When placed into racking systems all loads must be uniformly distributed on the load bearing beams. A penalty should be awarded when the load is: <ul style="list-style-type: none"> <li>Stacked out of alignment with base load</li> <li>Stacked out of alignment with the racking</li> <li>Placed out of alignment with the adjacent stacks</li> </ul> |
| 31  | Incorrect set down vertical face       | Fails to deposit load correctly at the vertical face. The load must be deposited squarely on to the vertical face and within 150mm but not touching (see plan of course).  |

## Lifting, Lowering, Transporting Automatic Mode

| No. | CRITERIA   | EXPLANATORY NOTES   |
|-----|--|---|
| 32  | Fails to ensure truck is operating correctly               | A penalty should be awarded during lifting, lowering, transporting in automatic mode when the: <ul style="list-style-type: none"> <li>Forks are not fully retracted to the home position</li> <li>Forks/carriage are not fully rotated and</li> <li>Machine is travelling in a restricted speed mode</li> </ul> |
| 33  | Fails to activate correct mode for travel within the aisle | A penalty should be awarded when the operator fails to engage or disengage wire guidance.   |
| 34  | Fails to input correct programme                           | The operator should be penalised when an incorrect programme is activated.  |

## Parking

| No. | CRITERIA                             | EXPLANATORY NOTES   |
|-----|--------------------------------------|---|
| 35  | Fails to apply parking brake/neutral | A penalty should be awarded if either/or the parking brake/neutral is not applied. Where the lift truck has automatic parking brake system or the configuration of the lift truck does not facilitate neutral, no penalties are to be awarded. The lift truck manufacturer's handbook should be consulted for specific instructions on operating procedure. |
| 36  | Fails to lower fork arms/cab         | A penalty should be awarded when the truck is not parked aligned with the manufacturer's recommendations. No penalty will be awarded in situations where the heels cannot be lowered to actually touch the ground.  |
| 37  | 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.                        |
| 38  | Wheels not straight                  | Fails to leave wheels in straight-ahead position.   |

## ASSOCIATED KNOWLEDGE EXAMINATION

Rider Operated Very Narrow Aisle Lift Truck (Lateral and front stacking, operator up/operator down) (ABA Categories F1 &F2)

### 5. Theory Examination

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

A bank of open and multi-choice questions is included with this publication. The multi-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. **These are the only questions to be used in an 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 (multiple choice safety) and 10 operational (multiple choice operational) questions.

##### Mandatory Questions

Within the bank of multiple-choice safety questions there are 5 that are deemed as mandatory, these are identified in bold type. These mandatory questions must appear in every question paper. If a candidate answers any of these mandatory questions incorrectly the overall result of the examination will be a referral.

Ideally 20 questions should be applied 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 Associated Knowledge Examination

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 provided up to a maximum of 4 marks per question.

### Safety multiple-choice questions (MS)

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

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

### Operational multiple-choice questions (MO)

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

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



## Question Bank

### 'OPEN' TEST QUESTIONS

**5 questions to be chosen, 4 marks per question = 20 marks (20% of paper)**

**\* Operator up only – questions should only be used for theory papers relating to the F1 category testing**

1. List 4 hazards an operator should check for prior to entering a very narrow aisle:
  - A. Pedestrians
  - B. Debris
  - C. Oil & Water
  - D. Overhanging or protruding pallets
  - E. Damaged racking
  - F. Damaged guide rails (where applicable)
  - G. Other trucks
  - H. Uneven/damage surface
  
2. List two possible causes that could lead to the truck operating in restricted speed mode:
  - A. Forks not traversed fully home
  - B. Forks not rotated fully home
  - C. Forks too high
  - D. Cab too high
  - E. The operator has selected restricted speed mode
  - F. If the truck displays an error code
  
3. List four potential safety considerations to make when exiting an aisle:
  - A. Lower the load/cab
  - B. Slow down
  - C. Sound horn
  - D. Ensure the route is clear
  - E. Exit slowly

4. Name four reasons why the truck could potentially tip over sideways (lateral instability):
  - A. Turning too fast
  - B. Handling with an uneven weight distribution
  - C. Handling a load with the fork arms not fully inserted
  - D. Turning with a raised load/cab
  - E. Hitting obstructions
  - F. Incorrectly transporting a live load
  
5. Name two reasons why it is **not** permissible for another truck or pedestrian to enter the aisle:
  - A. The dangers of collision will increase due to the lift truck operator having to concentrate on pallet locations and adequate clearances
  - B. This could lead to contact with pedestrians, causing serious injury
  - C. Causing potential distraction to the operator during stacking/de-stacking operations
  
6. List four visual safety checks to perform prior to placing a pallet in the racking.
  - A. Is there adequate location space to accept the load being deposited into the racking
  - B. The racking is safe and secure
  - C. The racking has a clear Safe Working Load displayed (SWL)
  - D. Weight of pallet is within the racking SWL
  - E. The pallet/load condition is safe/secure and free from damage
  
7. Name two reasons why it is important for the operator to ensure that the fork arms are fully inserted in the load when operating within an aisle.
  - A. To ensure clearance to travel is maintained
  - B. Maximise truck stability
  - C. To minimise the load centre
  - D. To prevent contact with other loads and or the racking within the aisle

8. Name four overhead obstructions you may find within the workplace
  - A. Lights
  - B. Sprinklers
  - C. Beams
  - D. Heaters
  - E. Apex roofs
  - F. Doorways
  - G. Overhanging loads
  
9. Name four places you should **not** park your lift truck
  - A. Within an active aisle
  - B. Blocking fire exits
  - C. Blocking gangways
  - D. Designated storage locations
  - E. Blocking pedestrian walkways
  - F. Blocking doorways
  - G. Blocking fire fighting equipment
  - H. Blocking first aid posts
  - I. Blocking a loading bay
  - J. Anywhere that could cause an obstruction
  
10. Name four checks an operator should make to the load before lifting it.
  - A. Its weight
  - B. Its load centre
  - C. The location where you are to collect or deposit the load
  - D. Its condition and security
  - E. What the load consists of
  - F. Is the load 'live'?
  - G. What material the pallet is made from
  - H. Pallet configuration

11. Name four precautions an operator **must** take when re-charging traction batteries:

- A. The lift truck is switched off and isolated
- B. The forks are in the safe park position
- C. Ensure the charger is the correct type
- D. Where applicable ensure the charger is isolated
- E. No smoking/naked flames.
- F. Avoid wearing/using items that could potentially conduct electricity
- G. Report any defects regarding the charger, charger cables and connectors or the battery
- H. Ensure there is adequate ventilation for the battery
- I. Ensure hands are dry before handling connectors
- J. Ensure the cable is not left where it could be a potential trip hazard or could be damaged
- K. Wear the correct PPE
- L. Well lit area
- M. Do not use a mobile phone

12. Name four things to consider when checking the Emergency Evacuation Equipment on the truck: \*

- A. The equipment is the correct type for the machine in use
- B. The seal is intact
- C. There is no visible damage to the equipment
- D. The equipment is in place and in the designated position
- E. The equipment is within the identified inspection date

13. Name eight components an operator **must** check when completing a pre use inspection

- A. Rated Capacity Plate
- B. Tyres
- C. Fork Arms/Attachment
- D. External Condition
- E. Carriage Plate
- F. Safety Gates
- G. Traverse Plate and Turret
- H. Lights
- I. Mast
- J. Audible Warnings
- K. Mast Rollers/Slides
- L. Hydraulic Controls
- M. Lift Chains
- N. Presence Pedal
- O. Chain Pulleys
- P. Drive and Braking
- Q. Hydraulics
- R. Steering
- S. Wheels

14. Name two responsibilities as an employee under the Health and Safety at Work Act 1974:

- A. Duty of care to themselves
- B. Duty of care to others
- C. Duty to co-operate with management/employer on safety related aspects
- D. Not to interfere or recklessly misuse anything in relation to Health and Safety

15. Name four safety precautions an operator should take when approaching and negotiating blind corners:
  - A. Slow down
  - B. Sound the horn
  - C. Drive wide to increase visibility
  - D. Operate with caution and be prepared to stop
  
16. List 4 items of information that would be indicated on a safety belt (harness) data plate/tag\*
  - A. Model/harness description
  - B. CE Mark
  - C. Year of manufacture
  - D. Serial number
  - E. Next inspection due date
  - F. Manufacturer
  - G. EN identification Code
  
17. In relation to a truck's capacity, which 3 items of information **must** be printed on a truck's rating plate?
  - A. Lifting capacity
  - B. Load centre
  - C. Stacking height
  
18. Give 2 reasons truck positioning is important when conducting stacking and destacking operations
  - A. Assist with accuracy and alignment
  - B. Reduce damage to structures and goods
  - C. Discourage pedestrians walking between the lift truck and the stack

## MULTIPLE CHOICE QUESTIONS – SAFETY

10 questions to be chosen 4 marks per question = 40 marks (40% of paper).

Note: The questions in **BOLD** are mandatory questions and must be included in your question papers and must be answered correctly by the candidate in order to pass the associated knowledge test.

1. Who is responsible for checking that the lift truck is in good working order before use?
  - A. The management
  - B. The maintenance department
  - C. The operator
  - D. The insurer
  
2. The truck's maximum carrying capacity will be reduced when:
  - A. The load centre is increased
  - B. The load centre is decreased
  - C. The load obscures your view
  - D. When travelling in reverse
  
3. Whose responsibility is it to ensure the safety of pedestrians while operating a lift truck?
  - A. The lift truck operator
  - B. Management
  - C. The pedestrians themselves
  - D. The human resources department

4. From the list below select the last thing the operator should do before moving off?
  - A. Close the safety gate
  - B. Engage drive
  - C. Look around
  - D. Sound the horn
  
5. Lift trucks are more likely to turn over sideways when they are:
  - A. Loaded and driven slowly around corners
  - B. Loaded and driven quickly in a straight line
  - C. When braking hard
  - D. Unladen and turning sharply
  
6. What is the difference between Net weight and Gross weight?
  - A. Net weight = the product only; Gross weight = the weight of the product, pallet and packaging
  - B. Net weight = the weight of the load; Gross weight = the weight of the load and the pallet
  - C. They are both the same and refer to the weight of the truck
  - D. Gross weight only applies to live loads
  
7. What is meant by the term 'load centre' as it applies to lift trucks?
  - A. The width that the forks should be set on the carriage plate
  - B. The length of the truck and the load
  - C. The measurement to the middle of the load
  - D. It is the measurement given forward from the front face of the fork arms to the centre of gravity of the load
  
8. Prior to operating a lift truck in the working environment, the operator **must** have 'written authorisation' issued by:
  - A. The instructor who carried out the training
  - B. The employer
  - C. The lift truck supplier
  - D. The lift truck manufacturer



9. Enforcement of the Health and Safety at Work Act 1974, etc. is the responsibility of:
- A. The Health and Safety Commission (HSC)
  - B. The European Commissions United Inspectors (ECU)
  - C. The Health and Safety Executive and Local Authorities
  - D. The Police
10. Health and Safety legislation places responsibility for safety at work on:
- A. The employers
  - B. The employees
  - C. Everyone on the premises
  - D. Lift truck operators only
11. An Approved Code of Practice is:
- A. Requirement by law that everyone must comply
  - B. Advice to duty holders on how to comply with legislation
  - C. A registration scheme for the licensing of lift truck operators
  - D. Written by a manufacturer on how to operate a lift truck
12. Undercutting is used when:
- A. The operator cannot see the pallet slots so places the forks under the pallet
  - B. The forks are longer than the pallet and the pallet is adjacent to a wall or another pallet or the pallet cannot be heeled up immediately
  - C. The forks are shorter than the pallet and the load has to be carried carefully
  - D. When the load is at the maximum rated capacity of the lift truck
13. Who is allowed in the aisle during stacking and de-stacking operations?
- A. Supervisors
  - B. Maintenance Engineers
  - C. Nobody
  - D. Other employees

14. What action should you take if a fault occurs whilst operating the machine?
  - A. Park the truck as safely as possible and report it to the supervisor
  - B. Try and repair the fault yourself
  - C. Carry on until a convenient break and then report it
  - D. Report the fault the next working shift
  
15. \*If there is no emergency evacuation equipment available with the machine you should:
  - A. Take the equipment from the next available machine
  - B. Use the machine without the equipment
  - C. Report it to a supervisor or manager then use the machine until it is replaced
  - D. Report it to a supervisor or manager and do not operate the machine
  
16. \*How often should a narrow aisle machine (operator-up) have a thorough examination:
  - A. Every 12 months
  - B. Never
  - C. Minimum of every 6 months
  - D. Every 9 months
  
17. \*Who is permitted to use the emergency lowering device/procedure in an emergency?
  - A. Only a supervisor or manager
  - B. A trained narrow aisle (operator – down) operator
  - C. A person trained in the use of the system and procedure
  - D. Anyone who has read the manufacturer’s handbook
  
18. \*In the event of an operator being stranded or immobilised whilst operating a machine at height (forks not located in load) what is the preferred safety procedure to follow:
  - A. Utilise the emergency evacuation equipment
  - B. Climb down the racking
  - C. Machine to machine transfer
  - D. Release the hydraulic pressure using the safety function

19. What is the function of the presence actuator when operating the machine?
- A. To allow the machine to drive and to keep the operator's limbs within the confines of the machine at all times
  - B. To help with ease of steering/manoeuvring
  - C. For operator comfort
  - D. To reduce the risk of using a mobile phone or hand-held radio device
20. Why is it important to ensure there is no visible damage to guide rails before aisle entry?
- A. It is not important as this will have been checked by the safety team
  - B. To ensure the trucks rail guidance systems function correctly
  - C. It makes no difference as this is not the operator's responsibility
  - D. To reduce the clearance between the machine and the racking system
- 

#### MULTIPLE CHOICE QUESTIONS – OPERATIONAL

#### **10 questions to be chosen 4 marks per question = 40 marks (40% of paper).**

1. Why is it important to perform an all-round observational check including above the machine prior to raising the load or fork arms/attachment/cab:
- A. To avoid potential contact with overhead obstructions or pedestrians
  - B. To gain smooth entry into the pallet
  - C. To ensure the truck is stable during stacking and de-stacking operations
  - D. To help with judgement of placing the load
2. When placing a load in a racking location it should be placed:
- A. With even spacing between racking uprights and loads
  - B. Tight against the racking uprights
  - C. Close together in centre of the racking bays
  - D. Tight against adjacent loads

3. The spacing of the forks should be adjusted to engage a loaded pallet as follows:
  - A. As close together as possible
  - B. Spread as far apart as possible
  - C. Spread so as to take equal weight on each fork arm
  - D. It does not matter as long as the fork arms are fully inserted into the pallet
  
4. When sounding the lift trucks horn, exiting an aisle or negotiating blind corners you should:
  - A. Give one long blast to attract attention
  - B. Give one short toot to avoid discharging the battery
  - C. Make several short sharp blasts
  - D. Only if the operator notices another machine or pedestrian
  
5. How should the lift truck be parked?
  - A. The fork arms/attachment should be centralised in the stowed position 100mm – 150mm from the ground
  - B. The fork arms/attachment should be centralised in the stowed position 100mm – 150mm from the ground and ignition key removed/machine deactivated:
  - C. As near to the ground as practicable, machine isolated and the fork arms/attachment facing in a forward direction
  - D. The fork arms/attachment in the stowed position and touching or as near to the ground as the truck will permit, with the key removed/machine deactivated:
  
6. \*Simultaneous driving and lifting/lowering (diagonal driving) are:
  - A. Never allowed
  - B. Allowed only if you travel very slowly
  - C. Allowed only in stacking aisles when complying with the manufacturer’s handbook/recommendations
  - D. Allowed only when travelling slowly outside an aisle

7. The correct procedure to travel from a stacking aisle to a transfer aisle is:
  - A. Turn when the truck is about half way out of the racking aisle
  - B. Sound the horn and drive out into transfer aisle
  - C. Reduce speed and if transfer aisle is clear slowly enter the transfer aisle
  - D. Reduce speed, sound the horn and if transfer aisle is clear slowly enter the transfer aisle
  
8. When the forks are traversed out, sideways / lateral stability is:
  - A. Increased
  - B. Unaffected
  - C. Decreased
  - D. Unaffected below 500mm
  
9. If a load appears to be unstable and liable to collapse the operator should:
  - A. Close the relevant area/bay or aisle before reporting the matter to a supervisor or manager
  - B. Get help from a work colleague to rearrange the load
  - C. Rearrange the load yourself
  - D. Report it at the end of the shift
  
10. In normal circumstances, if the load on the forks obscures your view, you should:
  - A. Dismount, check that the way is clear, then drive slowly forward sounding the horn
  - B. Travel in reverse, looking in the direction of travel
  - C. Ask your supervisor to guide you with hand signals
  - D. Conduct an all-round check and proceed forwards very slowly with your head just outside the safety cage
  
11. While operating a lift truck what would you do if you saw some rubbish/dunnage lying in an aisle or warehouse location?
  - A. Inform the supervisor
  - B. Park the truck in a safe place and remove the obstruction
  - C. Inform the other truck operators and get it moved at break time
  - D. Ignore it as the next shift have cleaners that will move it

12. When following another truck, you should allow a minimum separation distance of: -
  - A. Two truck lengths
  - B. Three truck lengths
  - C. One truck length
  - D. It does not matter
  
13. When is it required to complete the pre-use inspection of the machine?
  - A. Daily
  - B. Weekly
  - C. Before using the machine that shift/taking over the use of the machine from another operator
  - D. When there is time to do it
  
14. At what speed should the machine normally be driven?
  - A. Fast enough to keep up with the pressure of work
  - B. At a speed consistent with the type of load and working conditions
  - C. Slowly and deliberately at all times
  - D. As quickly as the machine will allow
  
15. When leaving the machine why is it important to remove the key?
  - A. To ensure the machine is switched off
  - B. To avoid the key being stolen
  - C. To prevent unauthorised use of the machine
  - D. To save discharging the battery
  
16. How should the fork arms be positioned when performing stacking/de-stacking?
  - A. As wide as possible to prevent lateral movement of the load
  - B. Equally spaced to take an equal weight on each fork arm
  - C. It does not really matter as it does not affect the stability of the machine
  - D. As close as possible to allow easy access to the load

17. When preparing to move off, the safest procedure is as follows:

- A. Transmission engaged – perform an all around safety check – park brake off – move off
- B. Perform an all around safety check – transmission engaged – park brake off – move off
- C. Park brake off – transmission engaged – perform an all around safety check – move off
- D. Park brake off – perform an all around safety check – engage transmission – move off

## ASSOCIATED KNOWLEDGE TEST MARKING SHEET

F1 & F2 Very Narrow Aisle (Lateral and front stacking trucks - operator up/operator down)

|   |  |           |  |
|---|--|-----------|--|
| Organisation question paper reference number: |  | Test Date |  |
|---|--|-----------|--|

| Question | Open Question Answer Section | Mark |
|----------|------------------------------|------|
| 1        |                              | /4   |
| 2        |                              | /4   |
| 3        |                              | /4   |
| 4        |                              | /4   |
| 5        |                              | /4   |

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

Minimum pass mark 80%

|                   |  |       |  |        |  |
|-------------------|--|-------|--|--------|--|
| Percentage Score: |  | Pass: |  | Refer: |  |
|-------------------|--|-------|--|--------|--|

Mandatory Questions Answered Correctly?

|      |  |     |  |
|------|--|-----|--|
| Yes: |  | No: |  |
|------|--|-----|--|

|                      |  |
|----------------------|--|
| Candidate Signature: |  |
| Examiner Name:       |  |