OPITO APPROVED STANDARD

Rigger Competence (Stages 3 & 4)

Competence Assessment Standard

OPITO Standard Codes:
Stage 3 Assessment: 9099
Stage 4 Assessment: 9199
OPITO Standards

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The contents of this document were developed by an industry workgroup facilitated and supported by OPITO. The workgroup consisted of representation from a cross section of oil and gas industry employers, discipline experts working within the industry and members of the OPITO Approved Training network.

This standard has been verified and accepted through the governance and integrity management model for OPITO standards.

Guidance on this standard is available by contacting OPITO at: Standards Enquiries

This standard has been designed to accommodate global variations in national legislation and regulations. In the absence of relevant national legislation and regulations, OPITO approved centres should use legislative and regulatory criteria specified within this Standard.

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### AMENDMENTS

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INTRODUCTION

Industry requested that OPITO develop a robust and auditable minimum standard for training and competence assessment for the role of the Rigger. A rigger uses fixed and portable lifting equipment and accessories to locate loads to a position to allow final installation or fixing, or move loads to a position where they are accessible to a crane.

The Rigger’s route to competence certification and re-assessment is comprised of **four key stages.**

The four key stages are:

**Stage 1:** The Initial Training Programme  
Delegates successfully completing the Initial Training Programme will be awarded an OPITO Stage 1 Training certificate; this entitles the delegate to progress to Stage 2: supervised workplace experience. The Certificate is valid for 2 years.

**Stage 2:** Supervised workplace experience.  
Stage 2 specifies the series of supervised tasks which the candidate will be required to complete in order to gain relevant experience in the workplace. The candidate must complete a log book record of the supervised tasks.

**Stage 3:** Competence assessment  
Stage 3 specifies the assessment process and criteria for the candidate to demonstrate competence in the Rigger role.  
Successful candidates will be awarded an OPITO certificate of competence.  
The Certificate is valid for 2 years.

**Stage 4:** Re-assessment of competence.  
Stage 4 specifies the re-assessment criteria for riggers, who wish to maintain their OPITO competence certification.  
Successful candidates will be awarded an OPITO certificate of competence.  
The Certificate is valid for 2 years.

**Note:** An experienced rigger can opt to take the Stage 3 Assessment without completing Stages 1 and 2, providing they have verifiable evidence of the relevant experience – see Section A2 (Item ‘c’)

**This standard specifies the Stage 3 and Stage 4 prerequisites, competence assessment and re-assessment requirement for the Rigger role.**

The Rigger Training (Stages 1 & 2) Standard, which is explained in a *separate OPITO standard to this one, specifies the Initial Training and workplace experience requirement for the prospective Rigger.

*Separate OPITO Standard: The *OPITO-approved Rigger Training (Stages 1 & 2) Standard.*
## OPITO Rigger Standards: Four-Stage Progression Guide

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
<th>Success Requirement</th>
<th>Delegate/Candidate Successful</th>
<th>Delegate/Candidate Unsuccessful</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Initial Training programme</td>
<td>Achieved all Learning Outcomes plus 80% or greater pass mark in written test.</td>
<td>Delegate awarded OPITO Stage-1 Training Certificate [valid for 2 years] and can progress to Stage-2</td>
<td>The delegate will be required to retake the Initial Training Programme</td>
</tr>
<tr>
<td>2</td>
<td>Supervised Workplace Experience (logged)</td>
<td>Fully completed logbook of Stage-2 tasks (to be completed within 2 years of gaining a Stage-1 Certificate) Each task must be signed and dated by: (a) A competent witness, and (b) A task supervisor The Stage-2 Logbook must also be signed by a senior employer representative on completion of all the tasks - while working for that particular employer. Note: If the candidate Rigger changes employer: he/she will require a further signature from a senior representative of the new company. See key below for signatory role definitions</td>
<td>No Certificate awarded. The candidate will become eligible to take the Stage-3 Competence Assessment – within 2 years of being awarded the Stage-1 Training Certificate.</td>
<td>The candidate will be required to retake Stage-1 Initial Training Programme and complete stage-2 tasks.</td>
</tr>
<tr>
<td>3</td>
<td>Competence Assessment</td>
<td>Successfully completed all Stage-3 Competence Assessment Units and achieve 80% or greater in Knowledge Assessment written test</td>
<td>Candidate awarded an OPITO Stage-3 Competence Certificate [valid for 2 years] Deemed competent to undertake the Rigger role.</td>
<td>No certificate awarded. Candidate must retake the Stage-3 Assessment.</td>
</tr>
<tr>
<td>4</td>
<td>Reassessment of Competence</td>
<td>Successfully completed all Stage-4 Competence Assessment Units and achieve 80% or greater in Knowledge Assessment written test</td>
<td>Candidate awarded an OPITO Stage-4 Competence Certificate [valid for 2 years] Deemed competent to continue undertaking the Rigger role.</td>
<td>No certificate awarded. Candidate must retake the Stage-4 Assessment. Candidate’s employer to decide how to address the competence gap to allow the Rigger to continue in the role.</td>
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</tbody>
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### Stage 2 Signatory Role Title

<table>
<thead>
<tr>
<th>Role Title</th>
<th>Signatory Role Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competent Witness</td>
<td>A competent member of the Rigging Team who witnessed the candidate completing the Stage-2 task</td>
</tr>
<tr>
<td>Task Supervisor</td>
<td>Person in overall charge of the task to be carried out.</td>
</tr>
<tr>
<td>Senior Employer Representative</td>
<td>Person in a senior role within the candidate’s employing company.</td>
</tr>
</tbody>
</table>
SECTION A  STAGE 3 COMPETENCE ASSESSMENT

A.1 Target Group for Stage 3 Competence Assessment

The Target group for Stage 3 are personnel that wish to become OPITO-certified competent riggers - having successfully completed the OPITO Stages 1 & 2 Rigger Training and Workplace Experience, or possess sufficient and relevant work experience to be eligible for the OPITO Stage 3 assessment.

A.2 Candidate pre-requisites for Stage 3 Competence Assessment

Candidates for Stage 3 Rigger assessment require:

(a) A valid OPITO-approved Stage 1 Rigger Training Certificate

And

(b) A fully completed and valid logbook, based on the OPITO Stage 2 Rigger Standard workplace requirements (Appendix 1: Stage 2 Logbook Requirements)

Or

A formal letter from the candidate’s employer or senior employer representative stating that the candidate has met the equivalent of the OPITO Stage 2 lifting experience logbook criteria - stated in Appendix 1 of this standard. The formal letter should include details of the employer/senior employer representative’s position in the company, full contact details, and be signed and dated by the employer/senior employer representative.
A.3 Physical and stressful demands of Stage 3 Competence Assessment

Training and/or assessment activities contained within this Standard may include physically demanding and potentially stressful elements. All personnel who participate in such activities must be physically and mentally capable of participating fully.

OPITO-approved Centres are therefore required, as a minimum, to ensure that prior to participating in practical exercises the delegate or candidate provides written confirmation that they deem themselves physically and mentally capable of undertaking all aspects of the training or assessment. Centres must also make the delegate/candidate aware that they must immediately inform the Centre staff if this capability changes – at any time prior to, or during the programme.

Delegates/candidates must be advised that they are required to declare any current or pre-existing medical conditions which may be exacerbated by, or impair their ability to complete, the training/assessment programme. Should this be the case, the individual may be required to provide an authentic medical certificate issued since any identified medical condition was diagnosed.

The OPITO-approved Centre shall keep a record of the delegate’s/candidate’s declaration of fitness in accordance with their document control policy(s) or procedures.

This information, along with summary details of the type of physical activities the delegate/candidate will be asked to perform, will be given to delegates/candidates by the OPITO-approved Centre and, if applicable, to their sponsoring company as part of the joining instructions. The responsibility for declaring any known current or pre-existing medical conditions that could have adverse effects to the individual’s state of health while undertaking the training and/or assessment activities lies with the delegate/candidate and/or company sponsoring the delegate.

Where doubt exists regarding the fitness of any delegate/candidate, the OPITO-approved Centre should direct the individual to consult a medical officer familiar with the nature and extent of the training.

Note: Practical exercises should be designed and delivered solely to meet this Standard, and must not place on the delegates/candidates any physical or mental demands other than those required to meet the Standard.
A.4   Aim and Objectives of Stage 3 Competence Assessment

The aim and objectives of the OPITO Stage 3 competence assessment are to establish that the candidate has the required underpinning knowledge, understanding and practical skills to fulfill the role of Rigger safely and effectively.

A.5   Assessment Outcomes of Stage 3 Competence Assessment

The assessment outcomes of Stage 3 are specified in the Performance and Underpinning Knowledge and Understanding criteria of the Competence Unit in Section A8 and the successful completion of the written Knowledge Assessment test.
A.6 Candidate Stage 3 Assessment

The candidate Rigger must be assessed by a suitably qualified assessor; refer to Section C.2 for the Stage 3 Assessor requirements.

Stage 3 Assessment is comprised of two parts:

1. Knowledge assessment
2. Practical assessment

The Knowledge Assessment comprises a written test of which the pass mark is 80%. Note: The candidate can be supported verbally with the understanding of the questions (without leading the candidate) by the Assessor or Invigilator, but the written test must be a ‘closed book’ format.

Refer to Appendix 2 for information on the Knowledge Assessment.

Section A.8 contains the Practical Competence Assessment criteria. A successful candidate must meet all the Practical Assessment criteria. The Practical Assessment process is specified in Appendix 3.

The Stage 3 certificate will only be awarded if the candidate successfully completes both the Knowledge Assessment and the Practical Assessment.

The successful candidate i.e. the candidate that fully meets the knowledge and practical assessment standard will then be deemed competent to undertake Rigger operations in the workplace.

Where a candidate does not meet the required assessment outcomes: the assessor must clearly identify and record the outcomes which have not been met, and suggest any further training requirement. The Assessment Centre must provide the candidate and the candidate’s employer with a written report identifying why the candidate was unsuccessful and suggest any further training requirement – within 7 days of the assessment.

If the candidate does not meet the requirements of the Stage 3 Standard:

No certificate will be awarded and the candidate must retake the Stage-3 Assessment.

Assessor/Candidate Ratio

The maximum number of candidates undertaking the practical assessment is 4
The minimum number of candidates undertaking the practical assessment is 2

The assessor-to-candidate ratio is 1:1 (this refers to the fact that that even though four candidates may be assessed within the group of candidates, the assessor can only fully assess one candidate at a time)
A.7  Duration and timing of Stage 3 Competence Assessment

The candidates will be expected to carry out two rigging and lifting operations for their assessment, where they will be expected to lead the rigging and lifting operations. Candidates will also be expected to assist other candidates with rigging and lifting operations. The expected timings are:

1.5 hours per rigging and lifting operation

1.5 hours allowed for the written test.

Note: Where assessment is conducted in the workplace: it must be completed within one trip or hitch; the length of the trip/hitch would depend on individual company work cycles.
A.8 Stage 3 Competence Assessment Unit

This section specifies the **Stage 3 practical assessment criteria** (within the Competence Assessment Unit) for the Rigger Competence Stages 3 & 4 Standard. The Unit comprises both the Performance Criteria and the Underpinning Knowledge and Understanding Criteria.

There is one competence unit containing two elements for the Stage 3 practical assessment. The Unit and Element titles are as follows:

**Unit 1: Plan, Prepare, Lift and Move Loads**

**Element 1.1** Plan and prepare for lifting and moving of loads  
**Element 1.2** Lifting, moving, lowering and landing of a load

Each candidate will be expected to **lead two** lifting operations and **assist with two** lifting operations. Each lifting operation should be of approximately one and a half hours duration and include rigging activities.

The lifting operations must be either:

(a) Taken from a bank of lifting exercises (complete with risk assessments and lifting plans)  
   - prepared in advance by the Assessment Centre.  
   Or

(b) Planned workplace lifting operations (complete with risk assessments and lifting plans)  
   that tests the candidate against the Unit criteria specified in this section.

When leading the lifting operation, the candidate will be expected to brief the team (toolbox talk), allocate tasks and give clear instructions.

**Note:** Risk assessments and lifting plans must be approved by a *competent person*

*Competent Person: A person nominated to approve risk assessments and lifting plans by virtue of relevant knowledge and expertise.*
Competence Assessment Unit

UNIT 1 Plan, Prepare, Lift and Move Loads

The candidate will be required to demonstrate the lifting and rigging activities to the performance and underpinning knowledge criteria specified in Unit 1, incorporating the full range of tasks specified below:

Rigging Tasks:

1. Obtain and position the lifting equipment and lifting accessories as detailed in the lifting plan.
2. Lift, cross haul and lower loads.
3. Move loads where there are obstructions restricting the direct path of the load (e.g. over, under or around pipework).

ELEMENT 1.1 Plan and prepare for lifting and moving of loads

Element 1.1 Performance Criteria

The candidate must **demonstrate** the following:

1.1.1 Identify potential hazards associated with the lifting operation
1.1.2 Implement control measures to address the identified hazards
1.1.3 Plan the route for lifting and moving the load to minimise any risk to personnel and surroundings
1.1.4 Ensure the load is accurately assessed for approximate weight, incorporating an adequate safety factor
1.1.5 Communicate, discuss and ensure understanding of the prepared lifting plan and risk assessment with the lifting team
1.1.6 Communicate, discuss and agree with appropriate personnel, actions to take related to the lifting operation in the event of an emergency
1.1.7 Inform the relevant personnel of the lifting operation and identify any potential disruption to operations
1.1.8 Obtain the resources identified in the lifting plan required to move the load, following relevant rigging loft procedures.
1.1.9 Ensure the lifting equipment and lifting accessories are free of obvious defects, and certification is current
1.1.10 Carry out pre-use inspection of lifting equipment and lifting accessories
1.1.11 Prepare the load according to specified requirements of the lifting plan
1.1.12 Protect the load from possible damage during the lifting operation
1.1.13 Attach the lifting accessories to the load using industry best practice
1.1.14 Determine the centre of gravity of a load that has an offset centre of gravity
1.1.15 Install and position the lifting equipment for balanced weight distribution
1.1.16 Ensure appropriate barriers are installed at appropriate areas.

Note: During the assessment, the candidate must take account of the relevant worksite operational requirements, procedures and safe working practices.
Element 1.1 Underpinning Knowledge and Understanding Criteria:

The candidate must be able to demonstrate that they know and understand:

1.1.17 The employer’s responsibilities under Lifting Operations and Lifting Equipment Regulations
1.1.18 The hazards associated with a lifting operation
1.1.19 The purpose of a risk assessment and lifting plan
1.1.20 The approved procedures and practices in the context of the operations, the work activity and the workplace
1.1.21 How to determine the weight of loads
1.1.22 The relevant roles of personnel involved in lifting operations, and typical reporting lines
1.1.23 How to identify areas near the load where it is unsafe to stand
1.1.24 Load movement route planning methods and techniques
1.1.25 Areas of the installation/site which need special consideration if a load needs to be landed near or passes close to those areas
1.1.26 Rigging principles, SWL, WLL and angles of lift
1.1.27 Why lifting equipment and lifting accessories are marked e.g. SWL and WLL
1.1.28 Pre-use inspections of lifting equipment and lifting accessories
1.1.29 Considerations to ensure load stability, security and weight distribution
1.1.30 The types of faults that are possible with lifting equipment and lifting accessories
1.1.31 The key information to be included in handovers during lifting operations
1.1.32 Types of lifting accessories
1.1.33 The purpose of a rigging loft and the quarantine system
1.1.34 How to take into account dynamic factors.
ELEMENT 1.2 Lifting, moving, lowering and landing of a load

Element 1.2 Performance Criteria
The candidate must demonstrate the following:

1.2.1 Give clear instructions to the lifting team before and during the moving of the load
1.2.2 Use the identified method of communications derived from the risk assessment, lifting plan and permit-to-work, and comply with signalling protocols agreed within the lifting team, or company-specific protocols
1.2.3 Progressively apply force/tension to the load via the attached lifting equipment, until the weight of the load is fully taken up
1.2.4 Confirm the load security before raising to the minimum height required for moving
1.2.5 Maintain load security and stability throughout transportation of the load
1.2.6 Take adequate precautions to maintain the safety of personnel and surroundings during the moving of the load
1.2.7 Correctly position the load in the intended location and progressively remove the lifting equipment force/tension, safely disconnect the load from the lifting equipment and remove the lifting accessories
1.2.8 Work effectively as part of a team
1.2.9 Comply with relevant health and safety legislation and guidelines at all times.

Element 1.2 Underpinning Knowledge and Understanding Criteria:
The candidate must be able to demonstrate that they know and understand:

1.2.10 The capabilities and limitations of lifting equipment and lifting accessories
1.2.11 What to do when the lifting/rigging operation requires a deviation from the lifting plan (this must be ascertained by the assessor during the assessment at the lift site)
1.2.12 Post-use inspections on lifting equipment and lifting accessories
1.2.13 How to identify and report defective lifting equipment, lifting accessories and associated materials
1.2.14 How to correctly store various items of lifting equipment and lifting accessories
1.2.15 How to restore the worksite and return lifting equipment and lifting accessories to the required location
1.2.16 How to conduct post-work debriefings.

Note: During the assessment, the candidate must take account of the relevant worksite operational requirements, procedures and safe working practices.
SECTION B  STAGE 4 COMPETENCE REASSESSMENT

B.1  Target Group for Stage 4 Reassessment

The target group for Stage 4 are personnel that wish to renew their OPITO Rigger Stage 3 or Stage 4 competent certificate (two year validity for each certificate).

B.2  Candidate Prerequisites for Stage 4 Reassessment

Candidates for Stage 4 Reassessment require a valid OPITO-approved Stage 3 or Stage 4 Rigger Certificate.
B.3 Physical and Stressful demands of Stage 4 Reassessment

Training and/or assessment activities contained within this Standard may include physically demanding and potentially stressful elements. All personnel who participate in such activities must be physically and mentally capable of participating fully.

OPITO-approved Centres are therefore required, as a minimum, to ensure that prior to participating in practical exercises the delegate or candidate provides written confirmation that they deem themselves physically and mentally capable of undertaking all aspects of the training or assessment. Centres must also make the delegate/candidate aware that they must immediately inform the Centre staff if this capability changes – at any time prior to, or during the programme.

Delegates/candidates must be advised that they are required to declare any current or pre-existing medical conditions which may be exacerbated by, or impair their ability to complete, the training/assessment programme. Should this be the case, the individual may be required to provide an authentic medical certificate issued since any identified medical condition was diagnosed.

The OPITO-approved Centre shall keep a record of the delegate’s/candidate’s declaration of fitness in accordance with their document control policy(s) or procedures.

This information, along with summary details of the type of physical activities the delegate/candidate will be asked to perform, will be given to delegates/candidates by the OPITO-approved Centre and, if applicable, to their sponsoring company as part of the joining instructions. The responsibility for declaring any known current or pre-existing medical conditions that could have adverse effects to the individual's state of health while undertaking the training and/or assessment activities lies with the delegate/candidate and/or company sponsoring the delegate.

Where doubt exists regarding the fitness of any delegate/candidate, the OPITO-approved Centre should direct the individual to consult a medical officer familiar with the nature and extent of the training.

Note: Practical exercises should be designed and delivered solely to meet this Standard, and must not place on the delegates/candidates any physical or mental demands other than those required to meet the Standard.
B.4 Aim and objectives of Stage 4 Reassessment

The aim and objectives of the OPITO Stage 4 competence reassessment are to establish that the candidate has maintained the competence requirement for the Rigger role.

B.5 Assessment Outcomes of Stage 4 Reassessment

The assessment outcomes of Stage 4 are specified in the Performance and Underpinning Knowledge and Understanding criteria of the Competence Units in Section B.8 and the successful completion of the written Knowledge Assessment test.
B.6 Candidate Stage 4 Reassessment

Note: It is the responsibility of employers to ensure their riggers continue to be competent to undertake lifting operations relevant to their role.

When a Rigger requires Stage 4 Reassessment, he/she must be assessed by a suitably qualified assessor; refer to Section C.2 for Assessor requirements.

Stage 4 Reassessment is comprised of two parts:

1. Knowledge assessment
2. Practical assessment

The Knowledge Assessment comprises a written test of which the pass mark is 80%
Note: The candidate can be supported verbally with the understanding of the questions (without leading the candidate) by the Assessor or Invigilator, but the written test must be a ‘closed book’ format.

Refer to Appendix 2 for information on the Knowledge Assessment.

Section B.8 contains the Practical Competence Assessment criteria. A successful candidate must meet all the Practical Assessment criteria.
The Practical assessment process is specified in Appendix 3

The Stage 4 certificate will only be awarded if the candidate successfully completes both the Knowledge Assessment and the Practical Assessment.

The successful candidate i.e. the candidate that fully meets the knowledge and practical assessment standard will then be deemed competent to undertake rigger operations in the workplace

Where a candidate does not meet the required assessment outcomes: the assessor must clearly identify and record the outcomes which have not been met, and suggest any further training requirement. The Assessment Centre must provide the candidate and candidate’s employer with a written report identifying why the candidate was unsuccessful and suggest any further training requirement – within 7 days of the assessment.

If the candidate does not meet the requirements of Stage 4 Standard:
No certificate will be awarded. The candidate must retake the Stage-4 Assessment.

Assessor/Candidate Ratio

The maximum number of candidates attending the practical assessment is 4
The minimum number of candidates attending the practical assessment is 2
The assessor-to-candidate ratio is 1:1 (This refers to the fact that that even though four candidates may be assessed within the group of candidates, the assessor can only fully assess one candidate at a time)
B.7 Duration and timing of Stage 4 Reassessment

The candidates will be expected to carry out two rigging and lifting operations for their assessment, where they will be expected to lead the rigging and lifting operations. Candidates will also be expected to assist other candidates with rigging and lifting operations. The expected timings are:

- 1.5 hours per rigging and lifting operation
- 1.5 hours allowed for the written test.

Note: Where assessment is conducted in the workplace: it must be completed within one trip or hitch; the length of the trip/hitch would depend on individual company work cycles.

B.8 Stage 4 Competence Assessment Unit

This section specifies the Stage 4 practical assessment criteria (within the Competence Assessment Unit) for the Rigger Stages 3 & 4 Standard. The Unit comprises both the Performance criteria (practical) and the Underpinning Knowledge and Understanding criteria. 

**Note:** Stage 4 Unit is the same Unit as Stage 3 Assessment i.e. Unit 1.

There is one competence unit containing two elements for Stage 4 practical assessment. The Unit and Element titles are as follows:

**Unit 1:** Plan, Prepare, Lift and Move Loads
- **Element 1.1** Plan and prepare for lifting and moving of loads
- **Element 1.2** Lifting, moving, lowering and landing of a load

Each candidate will be expected to lead two lifting operations and assist with two lifting operations. Each lifting operation should be of approximately one and a half hours duration and include rigging activities.

The lifting operations must be either:

(c) Taken from a bank of lifting exercises (complete with risk assessments and lifting plans) - prepared in advance by the OPITO-approved Assessment Centre.

Or

(d) Planned workplace lifting operations (complete with risk assessments and lifting plans) that tests the candidate against the Unit criteria specified in this section.

When leading the lifting operation, the candidate will be expected to brief the team (toolbox talk), allocate tasks and give clear instructions.

**Note:** Risk assessments and lifting plans must be approved by a *competent person*

*Competent Person: A person nominated to approve risk assessments and lifting plans by virtue of relevant knowledge and expertise.
Stage 4 Competence Assessment Unit

Refer to Unit 1 in Section A8 of this Standard for assessment criteria.
SECTION C  CENTRE RESOURCES

C.1  Location of Assessment

It is recognised that certain elements of competence assessment can be more robust when carried out ‘on-the-job’. Accordingly, this Standard has been deemed suitable for ‘on-location’ assessment. However, prior to any such assessments taking place, OPITO-Approved Training & Assessment Centres must comply with the following requirements:

(a) Prior to initial approval, the Training & Assessment Centre will specify a single onshore ‘approved site’ and advise OPITO of its intention to carry out assessments remotely, i.e. ‘on-location’.

(b) Prior to initial approval, the Training & Assessment Centre will advise OPITO where all their remote assessments are expected to take place. After approval is awarded, any additional locations must be communicated to OPITO as and when they arise.

(c) The Training & Assessment Centre shall ensure the suitability of ‘on-location’ facilities and arrangements prior to each assessment.

(d) Documented evidence will be retained to show that assessment at the remote site meets the criteria detailed in this OPITO standard including, but not limited to, facilities, equipment and qualifications of relevant staff (see Section C2).

(e) Documented evidence shall be retained that record all measures required to assure the quality and safety of ‘on-location’ assessment activities.

(f) All records must be retained at the single onshore ‘approved site’ (see Point (a) above).

(g) OPITO reserves the right to audit any or all of the remote sites operated by the Training & Assessment Centre at any time.
C.2 Staff

In order that an assessment programme may be delivered successfully it is essential that the right people are in place to support the programme.

OPITO-approved assessment centres must ensure that assessors are competent and qualified to conduct the assessment of candidates undertaking the Stage 3 & 4 Rigger Assessments.

Assessor Requirements

Assessors must:

(a) Be occupationally competent i.e. they must have a valid OPITO Stage 3 or 4 Rigger certificate, and a minimum of 3 years experience in the Rigger role.
(b) Hold an industry-recognised assessor’s qualification e.g. A1, D33, L20, the OPITO-approved Competence Assessor Certificate, or equivalent qualification.
(c) Fully understand the OPITO-approved Assessment Centre’s internal quality assurance of assessment processes and practices.
(d) Fully understand the requirements of this Industry Standard
(e) Fully understand the OPITO requirements for recording assessment decisions and securely maintaining accurate records of these.
(f) Participate in regular standardisation meetings or events to ensure a consistent approach to assessment.
(g) Undertake and record continuing professional development (CPD).
C.3 Facilities

OPITO-approved Assessment Centres must, as a minimum, comply with the following:

**Administration arrangements** must be made available to support candidates through the assessment process.

**Practical** assessments must be planned in advance to ensure that all the candidates get an equal opportunity to demonstrate their rigging and lifting skills - as specified in this Standard.

**All facilities must be maintained and where appropriate, inspected and tested in accordance with current standards/legislation.**

C.4 Equipment

As a minimum, the following equipment is required to meet the stated content of the assessment:

1. Appropriate PPE e.g. safety helmets, safety boots, eye protection, hearing protection, and gloves. Also high-visibility vests for candidates/assessors.
2. A variety of loads to be lifted e.g. structural steelwork, steelwork assemblies, pipework assemblies, plant and equipment, loads with an offset centre of gravity etc.
3. Examples of damaged lifting equipment and lifting accessories
4. Appropriate lifting equipment and lifting accessories; the lifting equipment and accessories should be of types typically found in a workplace rigging loft, to include:

<p>| | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>a. Chain blocks</td>
<td>g. Beam trolley</td>
</tr>
<tr>
<td>b. Snatch blocks</td>
<td>h. Skids/jacks</td>
</tr>
<tr>
<td>c. Pull lifts</td>
<td>i. Slings (wire/webbing)</td>
</tr>
<tr>
<td>d. Tirfor</td>
<td>j. Eye bolts</td>
</tr>
<tr>
<td>e. Beam clamps</td>
<td>k. Shackles</td>
</tr>
<tr>
<td>f. Master links</td>
<td>l. Turnbuckles</td>
</tr>
</tbody>
</table>

All equipment must be maintained and inspected and tested in accordance with applicable legislation and standards. Certificates and maintenance schedules should be available at all times.

**Note:** Damaged lifting equipment and lifting accessories - purposely used for specific assessment criteria by the approved centre - must be securely controlled and clearly identifiable to the assessor and centre support staff.
SECTION D  CERTIFICATION & ADMINISTRATION

D.1  Joining Instructions

The OPITO-approved Assessment Centre must provide the candidate either with a copy of the OPITO-approved Rigger (Stages 3 & 4) Competence Assessment Standard or a link to the Standard on the OPITO website - so that the candidate can make himself/herself aware of the requirements of the Standard.

D.2  Validity and Renewal

The Rigger Stage 3 Certificate is valid for two years

The Rigger Stage 4 Certificate is valid for two years

D.3  Certification

Candidates successfully meeting the OPITO-approved Stage 3 or Stage 4 Assessment Standard will be issued with an OPITO Rigger Stage 3 (or Stage 4) certificate of competence.

The issue of the certificate indicates that the candidate has achieved the level of competence as defined by oil and gas industry employers under a process approved by OPITO. The details of each candidate will be updated on Vantage, the industry’s central recording data base.

Continued.
D.3 Certification continued.

**OPITO-approved Assessments Centres are responsible for** issuing a certificate directly to the candidate successfully completing the assessment, and to the sponsoring company (when required), or if the candidate is unsuccessful, providing the candidate and candidate’s employer with a written report identifying why the candidate was unsuccessful and suggest any further training requirement.

Each certificate must indicate that the candidate has been assessed against and met the required standard.

The certificate must contain the following:

(a) Assessment Centre name  
(b) Full OPITO course title stating that it is OPITO-approved  
(c) OPITO registration code  
(d) Candidate’s name  
(e) Assessment date(s)  
(f) Expiry date  
(g) Unique Certificate Number (refer to [guide on OPITO website](#))  
(h) Assessment Centre Signatory

**D.4 Assessment Administration**

Each candidate attending any OPITO-approved programme must be registered with the Central Register (CR) operated by OPITO. Registration must be made by the OPITO-approved Assessment Centre to OPITO within one week following candidate’s successful Stage 3 or Stage 4 assessment.

OPITO confirms that information on the registration form will be contained in a computerised register which will be available to employers, prospective employers and training providers in the oil and gas industry to verify training/assessment records. At all times use of this data will be strictly in accordance with principles laid down in the UK Data Protection Act, 1998.
### Glossary of Terms and Abbreviations

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessor</td>
<td>A suitably qualified and experienced person appointed by the OPITO-approved Centre to make accurate and objective decisions as to whether an individual’s knowledge and performance meet the requirements specified in the relevant OPITO-approved standard.</td>
</tr>
<tr>
<td>Candidate</td>
<td>An individual whose ability, knowledge and skills are to be assessed against the expected performance requirements of the relevant OPITO-approved standard.</td>
</tr>
<tr>
<td>Delegate</td>
<td>Person undertaking the training</td>
</tr>
<tr>
<td>FPSO</td>
<td>Floating Production Storage and Offloading (vessel)</td>
</tr>
<tr>
<td>Lifting Equipment</td>
<td>Work equipment for lifting or lowering loads, and includes its attachments for anchoring, fixing or supporting it e.g. chain hoist, lever hoist, air hoist, winches, cranes etc.</td>
</tr>
<tr>
<td>Lifting Appliances</td>
<td>A name commonly used in the industry for lifting equipment.</td>
</tr>
<tr>
<td>Lifting Accessories</td>
<td>Any device which is used or designated to be used directly or indirectly to connect a load to a lifting appliance, and which does not form part of the load, e.g. wire rope slings, synthetic fibre slings, hooks, shackles, eye bolts etc.</td>
</tr>
<tr>
<td>Restricted Access</td>
<td>A lifting operation where there are restrictions to the access of the load to be moved or restrictions to the route of the load.</td>
</tr>
<tr>
<td>Rigging</td>
<td>A term used for the installation and removal of the lifting equipment and lifting accessories that will be used in a lifting operation</td>
</tr>
<tr>
<td>SWL</td>
<td>Safe Working Load</td>
</tr>
<tr>
<td>TBT</td>
<td>Toolbox Talk</td>
</tr>
<tr>
<td>Valid Certificate</td>
<td>An authentic certificate which is in-date i.e. has not expired</td>
</tr>
<tr>
<td>WLL</td>
<td>Working Load Limit</td>
</tr>
</tbody>
</table>
Appendix 1: Stage 2 Logbook Work Experience Requirements

For the candidate to become eligible to take the Stage 3 Assessment, a fully completed and valid Stage 2 logbook must be presented to the OPITO-approved Assessment Centre that is conducting the assessment, within two years from the completion date shown on the candidate’s Stage 1 Certificate.

Each of the ten rigging tasks specified below must be undertaken on a different lifting operation and on a different date i.e. the candidate can not get more than one task signed off on the same day. The candidate therefore, can not take less than 50 days to complete all of the Stage 2 tasks.

The Stage 2 Logbook must record the following workplace experience:

The candidate must undertake the following rigging and lifting tasks:

1. Follow an *approved lifting plan and risk assessment, and obtain and rig up all lifting equipment and lifting accessories required for the lifting operation - on five separate dates.
2. Conduct pre-use inspections on all lifting equipment and lifting accessories required to carry out the lifting operation - on five separate dates.
3. Determine the weight of the load and plan the route, final position and orientation of the load - on five separate dates.
4. Perform cross hauling lifting operations - on five separate dates.
5. Lift, move, lower and land a load with an offset centre of gravity (unbalanced load) - on five separate dates.
6. Perform a restricted access lift - on five separate dates.
7. Reposition the lifting equipment during cross-hauling - on five separate dates.
8. Position the load in the required location and in the correct orientation - on five separate dates.
9. De-rig the lifting equipment and lifting accessories and reinstate the worksite - on five separate dates.
10. Undertake post-use inspections on the lifting equipment and lifting accessories, return them to the rigging loft and report any defects found - on five separate dates.

* approved: Lifting plans and risk assessments must be approved by a competent person i.e. the person nominated to approve risk assessments and lifting plan by virtue of relevant knowledge and expertise.

The Stage 2 Logbook remains the property of the candidate at all times but the OPITO-approved Assessment Centre will be required to record (and sign) that they have checked the candidate’s Stage 2 Logbook for completion and validation and retain a copy of the page/s in the Logbook containing a record of signatures and contact details of the senior employer representatives; this is for OPITO verification and audit purposes. OPITO may inspect these records at the OPITO-approved Assessment Centre during annual monitoring audits.

A blank Stage 2 Logbook will be given to the successful Stage 1 delegate by the OPITO-approved Centre that provided the Stage 1 training.

Further details of the Stage 2 Logbook are specified in the OPITO Rigger Stages 1 & 2 Standard
Appendix 2: Knowledge Assessment Questions Requirement

The Knowledge Assessment package (bank of questions for the written test) will be sent to OPITO-approved centres by OPITO when they become approved to deliver the OPITO Rigger Competence Stages 3 & 4 Assessment.
Appendix 3: Practical Assessment Process

The OPITO-approved Assessment Centre must confirm that that the candidate is eligible to undertake the Stage 3 or Stage 4 Assessment.

The practical assessment will consist of the following:

(a) The candidate must be briefed to ensure he/she knows how the assessment will be conducted and what is expected of him/her during the assessment.

(b) The OPITO-approved Assessment Centre must provide candidate with lifting plans for the lifting operations to be undertaken, that have been approved by a *competent person.

(c) The OPITO-approved Assessment Centre must provide candidate with risk assessments for the lifting operations to be undertaken, that have been approved by a *competent person.

(d) The assessor must provide feedback to the candidate following completion of the practical assessments.

*Competent Person: A person nominated to approve risk assessments and lifting plans by virtue of relevant knowledge and expertise.

Notes for the Assessor

1. Where the assessment is conducted at the worksite, the tasks associated with the practical assessment must be conducted within a realistic timeframe. The Assessor will determine a reasonable timeframe for the candidate to complete each task – taking into account worksite environment and activities.

2. An approved assessment checklist and record sheet must be used, and will be made available to the Assessor (Refer to Appendix 4) by the OPITO-approved Assessment Centre.
Appendix 4: OPITO Stages 3 & 4 Competence Assessment Record

The following pages contain the Rigger Competence Stages 3 & 4 Assessor Checklists and the Assessment Record sheets. Although OPITO-approved Centres may develop their own versions of the Assessor Checklist and Competence Assessment Record, these must, as a minimum, include all the information contained in the Assessor Checklists and Competence Assessment Record sheets specified within this standard – see next pages for the Assessor Checklist and Assessment Record.

Checklist Notes

Assessment Performance Criteria
Checklist Reference numbers relate to Performance and Underpinning Knowledge and Understanding Criteria specified in Unit 1.

Assessment Underpinning knowledge and Understanding criteria
The Assessor can infer Underpinning knowledge and Understanding by:

(a) Observing the candidate performing the rigging task
(b) Asking the candidate questions during the assessment
(c) The candidate correctly answering the relevant questions from the written test (see Section A6).

Checklist Abbreviations
VQ Verbal Questioning
OBS Observation
WT Written Test
# OPITO Rigger Competence Stages 3 & 4 Assessor Checklist

## Assessment Centre

<table>
<thead>
<tr>
<th>Assessment Centre Address</th>
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## Candidate Name

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<tr>
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## Assessor Name

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<tr>
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## Unit

| 1 | Plan, Prepare, Lift and Move Loads |

## Element

| 1.1 | Plan and prepare for lifting and moving of loads |

### Performance Criteria

<table>
<thead>
<tr>
<th>Ref No.</th>
<th>Performance Criteria</th>
<th>Achieved Y/N</th>
<th>VQ / OBS / WT</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.1</td>
<td>Identify potential hazards associated with the lifting operation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.2</td>
<td>Implement control measures to address the identified hazards</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.3</td>
<td>Plan the route for lifting and moving the load to minimise any risk to personnel and surroundings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.4</td>
<td>Ensure the load is accurately assessed for approximate weight, incorporating an adequate safety factor</td>
<td></td>
<td></td>
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<tr>
<td>1.1.5</td>
<td>Communicate, discuss and ensure understanding of the prepared lifting plan and risk assessment with the lifting team</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1.1.6</td>
<td>Communicate, discuss and agree with appropriate personnel, actions to take related to the lifting operation in the event of an emergency</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1.1.7</td>
<td>Inform the relevant personnel of the lifting operation and identify any potential disruption to operations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.8</td>
<td>Obtain the resources identified in the lifting plan required to move the load, following relevant rigging loft procedures</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1.1.9</td>
<td>Ensure the lifting equipment and lifting accessories are free of obvious defects, and certification is current</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.10</td>
<td>Carry out pre-use inspection of lifting equipment and lifting accessories</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1.1.11</td>
<td>Prepare the load according to specified requirements of the lifting plan</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1.1.12</td>
<td>Protect the load from possible damage during the lifting operation</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1.1.13</td>
<td>Attach the lifting accessories to the load using industry best practice</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.14</td>
<td>Determine the centre of gravity of a load that has an offset centre of gravity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.15</td>
<td>Install and position the lifting equipment for balanced weight distribution</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.16</td>
<td>Ensure appropriate barriers are installed at appropriate areas</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Assessor Signature

<table>
<thead>
<tr>
<th>Assessment Date</th>
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</thead>
</table>
## OPITO Rigger Competence Stages 3 & 4 Assessor Checklist

### Assessment Centre

**Assessment Centre Address**

<table>
<thead>
<tr>
<th>Candidate Name</th>
<th>Employer</th>
<th>No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessor Name</td>
<td>Employer</td>
<td>No.</td>
</tr>
</tbody>
</table>

### Unit 1 Plan, Prepare, Lift and Move Loads

| Element | 1.1 Plan and prepare for lifting and moving of loads |

#### Underpinning Knowledge & Understanding

<table>
<thead>
<tr>
<th>Ref No.</th>
<th>Underpinning knowledge and Understanding Criteria</th>
<th>Achieved</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.17</td>
<td>The employer’s responsibilities under Lifting Operations and Lifting Equipment Regulations</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.18</td>
<td>The hazards associated with a lifting operation</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.19</td>
<td>The purpose of a risk assessment and lifting plan</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.20</td>
<td>The approved procedures and practices in the context of the operations, the work activity and the workplace</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.21</td>
<td>How to determine the weight of loads</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.22</td>
<td>The relevant personnel involved in lifting operations, and typical reporting lines</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.23</td>
<td>How to identify areas near the load where it is unsafe to stand</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.24</td>
<td>Load movement route planning methods and techniques</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.25</td>
<td>Areas of the installation/site which need special consideration if a load needs to be landed near or passes close to those areas</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.26</td>
<td>Rigging principles, SWL, WLL and angles of lift</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.27</td>
<td>Why lifting equipment and lifting accessories are marked e.g. SWL and WLL</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.28</td>
<td>Pre-use inspections of lifting equipment and lifting accessories</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.29</td>
<td>Considerations to ensure load stability, security and weight distribution</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.30</td>
<td>The types of faults that are possible with lifting equipment and lifting accessories</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.31</td>
<td>The key information to be included in handovers during lifting operations</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.32</td>
<td>Types of lifting accessories</td>
<td>Y/N</td>
<td></td>
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<tr>
<td>1.1.33</td>
<td>The purpose of a rigging loft and the quarantine system</td>
<td>Y/N</td>
<td></td>
</tr>
<tr>
<td>1.1.34</td>
<td>How to take into account dynamic factors</td>
<td>Y/N</td>
<td></td>
</tr>
</tbody>
</table>

**Assessor Signature**

**Assessment Date**

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### OPITO Rigger Competence Stages 3 & 4 Assessor Checklist

<table>
<thead>
<tr>
<th>Assessment Centre</th>
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<td></td>
</tr>
<tr>
<td><strong>Candidate Name</strong></td>
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</tr>
<tr>
<td><strong>Assessor Name</strong></td>
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<tr>
<td><strong>Unit</strong></td>
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<tr>
<td><strong>Element</strong></td>
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<th>Ref No.</th>
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<th>Achieved Y/N</th>
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<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.2.1</td>
<td>Give clear instructions to the lifting team before and during the moving of the load</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2.2</td>
<td>Use the identified method of communications derived from the risk assessment, lifting plan and permit-to-work, and comply with signalling protocols agreed within the lifting team, or company-specific protocols</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2.3</td>
<td>Progressively apply force/tension to the lifting equipment until the weight of the load is fully taken up</td>
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</tr>
<tr>
<td>1.2.4</td>
<td>Confirm the load security before raising to the minimum height required for moving the load</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2.5</td>
<td>Maintain load security and stability throughout transportation of the load</td>
<td></td>
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</tr>
<tr>
<td>1.2.6</td>
<td>Take adequate precautions to maintain the safety of personnel and surroundings during the moving of the load</td>
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<td></td>
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</tr>
<tr>
<td>1.2.7</td>
<td>Correctly position the load in the intended location and progressively remove the lifting equipment force/tension, safely disconnect the load from the lifting equipment and remove the lifting accessories.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2.8</td>
<td>Work effectively as part of a team</td>
<td></td>
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</tr>
<tr>
<td>1.2.9</td>
<td>Comply with relevant health and safety legislation and guidelines at all times.</td>
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</tbody>
</table>

**Assessor Signature**

**Assessment Date**
## OPITO Rigger Competence Stages 3 & 4 Assessor Checklist

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<tr>
<td>Assessor Name</td>
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</table>

### Unit: 1

#### Plan, Prepare, Lift and Move Loads

#### Underpinning Knowledge & Understanding

<table>
<thead>
<tr>
<th>Ref No.</th>
<th>Underpinning Knowledge &amp; Understanding Criteria</th>
<th>Achieved Y/N</th>
<th>VO / OBS / WT</th>
<th>Comments</th>
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<tbody>
<tr>
<td>1.2.10</td>
<td>The capabilities and limitations of lifting equipment and lifting accessories</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2.11</td>
<td>What to do when the lifting or rigging operation requires a deviation from the original lifting plan (this must be ascertained by the assessor during the assessment at the lift site)</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1.2.12</td>
<td>How to conduct post-use inspections on lifting equipment and lifting accessories</td>
<td></td>
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<tr>
<td>1.2.13</td>
<td>How to identify and report defective lifting equipment and lifting accessories and associated materials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2.14</td>
<td>How to correctly store various items of lifting equipment and lifting accessories</td>
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<tr>
<td>1.2.15</td>
<td>How to restore the worksite and return lifting equipment and lifting accessories to the required location</td>
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<tr>
<td>1.2.16</td>
<td>How to conduct post-work debriefings.</td>
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## Assessor Signature

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## OPITO Rigger Competence Stage 3 Assessment Record

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<td>Plan, Prepare, Lift and Move Loads</td>
<td>I can confirm that the candidate *has met / has not met the assessment criteria for this Unit</td>
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*Delete as applicable

Feedback to Candidate:

Note: If the candidate has not met the Assessment Criteria for this Unit: state the reasons why, and suggested any training requirement to address the competence gap.

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Revision 1 (Mar 2011) Amendment 2 (January 2013)
# OPITO Rigger Competence Stage 4 Assessment Record

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---

**Assessor**

Sign

Date

**Candidate**

Candidate comments

Sign

Date