



OPITO APPROVED STANDARD

Banksman & Slinger (Stages 3 & 4)

Competence Assessment Standards

Standard Codes

Standard	Code
Banksman & Slinger Stage 3	9068
Banksman & Slinger Stage 4 (Re-assessment of Stage 3)	9069

© OPITO

OPITO STANDARDS

OPITO is an Industry owned not for profit organisation that exists solely to service the needs of the Oil and Gas Industry.

OPITO is employer led in all aspects of what it does, therefore all standards development activities are at the behest of industry employers. The standards are driven by the needs of employers to help create a safe and competent workforce.

This standard is owned by the Oil and Gas Industry and maintained by OPITO who are the nominated custodians of all Industry standards within the OPITO portfolio which carry the OPITO logo.

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.

© OPITO

All rights reserved. No part of this publication may be reproduced, stored in a retrieval or information storage system, or transmitted in any form or by any means, mechanical, photocopying, recording or otherwise, without prior permission in writing of the publishers.

AMENDMENTS					
AMENDMENT & DATE		PAGES	CHANGES MADE BY	CHECKED BY	APPROVED BY
	Full 3-yearly review of the Standard completed in Dec 2010. New Revision: Rev.03	All	M. Carr	Les Anderson	J. Cameron
1	Replaced Course Code with Standard Code in Title Page and amended reference to 'course identification code' with 'OPITO registration code' under section D.3 Certification - to align with other OPITO standards Revision 3 Amendment 1 10-January 2013	Title Page, page 26	M. Foo	M. Carr	P. Lammiman
2	Inclusion of additional assessment criteria covering correct means of securing cargo inside container/half height using ratchet straps. Equipment and Facilities specifications also amended accordingly in Section C.3 & C.4. Revision 3 Amendment 2 30-September 2013	Page 13, 14, 20, 21, 24, 36, 37, 40, 41	M. Foo	OPITO Standards & Approvals	P. Lammiman
	Revision 4 published in March 2015 following a formal Industry Work Group review	All	S&D	S&A	GSAA

Any amendments to this Standard by OPITO will be recorded above.

CONTENTS

INTRODUCTION	5
SECTION A STAGE 3 COMPETENCE ASSESSMENT	7
A.1 TARGET GROUP FOR STAGE 3 COMPETENCE ASSESSMENT	7
A.2 CANDIDATE PRE-REQUISITES FOR STAGE 3 COMPETENCE ASSESSMENT	7
A.3 PHYSICAL AND STRESSFUL DEMANDS OF STAGE 3 COMPETENCE ASSESSMENT	7
A.4 AIMS AND OBJECTIVES OF STAGE 3 COMPETENCE ASSESSMENT	8
A.5 ASSESSMENT OUTCOMES OF STAGE 3	8
A.6 CANDIDATE STAGE 3 ASSESSMENT	8
A.7 DURATION AND TIMING OF STAGE 3 COMPETENCE ASSESSMENT	9
A.8 STAGE 3 COMPETENCE ASSESSMENT UNITS	10
SECTION B STAGE 4 COMPETENCE REASSESSMENT	15
B.1 TARGET GROUP FOR STAGE 4 REASSESSMENT	15
B.2 CANDIDATE PREREQUISITES FOR STAGE 4 REASSESSMENT	15
B.3 PHYSICAL AND STRESSFUL DEMANDS OF STAGE 4 REASSESSMENT	15
B.4 AIMS AND OBJECTIVES OF STAGE 4 REASSESSMENT	15
B.5 ASSESSMENT OUTCOMES OF STAGE 4 REASSESSMENT	15
B.6 CANDIDATE STAGE 4 REASSESSMENT	16
B.7 DURATION AND TIMING OF STAGE 4 REASSESSMENT	16
B.8 STAGE 4 COMPETENCE ASSESSMENT UNITS	17
SECTION C CENTRE RESOURCES	22
C.1 LOCATION OF ASSESSMENT	22
C.2 STAFF	23
C.3 FACILITIES	24
C.4 EQUIPMENT	24
SECTION D CERTIFICATION & ADMINISTRATION	26
D.1 JOINING INSTRUCTIONS	26
D.2 VALIDITY AND RENEWAL	26
D.3 CERTIFICATION AND RECORDING	26
D.4 ASSESSMENT ADMINISTRATION	27
Glossary of Terms and Abbreviations	28
Appendix 1: Stage 2 Logbook Work Experience Requirements	30
Appendix 2: Knowledge Assessment Questions Requirement	31
Appendix 3: Practical Assessment Process	32
Appendix 4: OPITO Stage 3 & 4 Competence Assessment Record	33

INTRODUCTION

Industry requested that OPITO develop a robust and auditable minimum standard for training and competence assessment for the Banksman & Slinger role.

Although the Banksman skill requirement differs from that of the Slinger; the two roles are normally combined in the workplace. The Banksman role is primarily to relay instructions to the crane operator during lifting activities, and the Slinger role is to prepare and 'sling' loads for lifting, and release the loads at their destination.

The Banksman & Slinger'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 certificate; this entitles the delegate to progress to Stage 2: supervised workplace experience.

Stage 2: Supervised workplace experience.

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

Stage 3: The formal assessment of the candidate.

Stage 3 specifies the assessment process and criteria for the candidate to demonstrate competence in the Banksman & Slinger 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 Banksman & Slingsers, 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 banksman & slinger can opt to take the Stage 3 Assessment without completing Stage 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 further re-assessment requirement for the Banksman & Slinger role.

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

*Separate OPITO Standard: *The OPITO -approved Banksman & Slinger (Stages 1 & 2) Training Standard*

OPITO Banksman & Slinger Standards: Four-Stage Progression Guide

Stage	Description	Success Requirement	Delegate/Candidate Successful	Delegate/Candidate Unsuccessful
1	Initial Training	Achieved all 45 Learning Outcomes plus 80% or greater pass mark in written test.	Delegate awarded OPITO Stage-1 Training Certificate [Valid for 2 years] and can progress to Stage-2	Delegate required to retake the Initial Training Programme
2	Workplace Experience (logged)	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 Banksman & Slinger changes employer: he/she will require a further signature from a senior representative of the new company. <i>See key below for signatory role definitions</i>	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.	Candidate required to retake Stage-1 Initial Training Programme and complete stage-2 tasks.
3	Competence Assessment	Successfully complete all Stage-3 Competence Assessment Units and achieve 80% or greater in Knowledge Assessment	Candidate awarded an OPITO Stage-3 Competence Certificate [valid for 2 years] Deemed competent to undertake the Banksman & Slinger role	No certificate awarded. Candidate must retake the Stage-3 Assessment. Candidate can not retake the Stage-3 within 28 days of an unsuccessful attempt, but must retake the Stage-3 no later than 3 months of an unsuccessful attempt.
4	Reassessment of Competence	Successfully complete all Stage-4 Competence Assessment Units and achieve 80% or greater in Knowledge Assessment	Candidate awarded an OPITO Stage-4 Competence Certificate [valid for 2 years] Deemed competent to undertake the Banksman & Slinger role.	No certificate awarded. Candidate must retake the Stage-4 Assessment. Candidate can not retake the Stage-4 within 28 days of an unsuccessful attempt, but must retake the Stage-4 no later than 3 months of an unsuccessful attempt. Candidate's employer to decide how to address the competence gap to allow Banksman & Slinger to continue in the role.
Stage 2 Signatory Role Title		Signatory Role Definition		
Competent Witness		A competent member of the Banksman & Slinger Team who witnessed the candidate completing the Stage-2 task		
Task Supervisor		Competent person in overall charge of the task to be carried out e.g. Deck Forman, Deck Coordinator		
Senior Employer Representative		Person in a senior role within the candidate's employing company e.g. Services Supervisor, Lifting Activities Supervisor or Site Manager.		

SECTION A STAGE 3 COMPETENCE ASSESSMENT

A.1 Target Group for Stage 3 Competence Assessment

The Target group for Stage 3 is personnel that wish to become OPITO certified competent Banksmen & Slingers - having previously completed Banksman & Slinger training, and/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 Banksman and Slinger assessment require:

- (a) A [valid](#) OPITO -approved Stage 1 Banksman and Slinger Training Certificate

And

- (b) A fully completed logbook, based on the OPITO Stage 2 Banksman and Slinger Standard workplace requirements ([Appendix 1: Stage 2 Logbook Requirements](#))

Or

- (c) A formal letter from the current employer on company letterhead 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 senior employer representative's position in the company, full contact details, and be signed and dated by the senior employer's representative. This letter shall be sent directly from the employer to the Assessment Centre prior to the assessment taking place.

A.3 Physical and stressful demands of Stage 3 Competence Assessment

Banksman & Slinger practical assessments will involve work of a physically nature. Training establishments/assessment centres are required to ensure that prior to participating in practical exercises/activities: the candidates undergo an appropriate *medical screening by the Assessment Centre

*Medical screening: Candidate to complete a self-declaration of medical fitness form.

Where doubt exists regarding the medical fitness of any candidate the Training Establishment/Assessment Centre should seek the advice of a medical officer.

Continued.

A.3 Continued.

This information will be given to candidates along with pre-assessment instructions. The responsibility for the individual completing the assessment, without any adverse effects to their present state of health, lies with the candidate and/or company sponsoring the candidate.

Note: Practical exercises should be designed and delivered solely to meet this standard, and must not place on the candidates any physical or mental demands other than those required to meet the Standard.

A.4 Aims and Objectives of Stage 3 Competence Assessment

The aim and objective of the OPITO Stage 3 competence assessment is to establish that the candidate has the required underpinning knowledge, understanding and practical skills to fulfill the role of Banksman & Slinger safely and effectively.

A.5 Assessment Outcomes of Stage 3

The assessment outcomes of Stage 3 are specified in the Performance and Underpinning Knowledge and Understanding criteria of the Competence Units in Section A8 **and** the successful completion of the written Knowledge Assessment

A.6 Candidate Stage 3 Assessment

The candidate Banksman & Slinger 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 by the Assessor or [Invigilator](#).

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.

© OPITO

A.6 Continued.

The successful candidate i.e. the candidate that fully meets the knowledge and practical assessment standard will then be deemed competent to undertake banksman & slinger 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's employer with a written report identifying why the candidate was unsuccessful and suggest any further training requirement.

Assessor/Candidate Ratio

The assessor to candidate ratio will be is **1:1** [assessor to candidates]

Note: Banksman & Slinger candidates may be part of a team of 3 during the assessment i.e. one Banksman and two Slingers.

The maximum number of candidates attending the practical assessment is **6**.

A.7 Duration and timing of Stage 3 Competence Assessment

The expected duration for completing the Stage 3 assessment is approximately 7 hours.

A.8 Stage 3 Competence Assessment Units

This section specifies the **practical assessment criteria** (within the Competence Assessment Units) for the Banksman & Slinger Stages 3 & 4 Standard. The Units comprise both the Performance criteria (practical) and the inferred Underpinning Knowledge and Understanding criteria.

There are two competence units for Stage 3 practical assessment.
They are:

Unit 1: Direct and control the movement and placing of loads

Unit 1 focuses on the **Banksman's** role – specifying the Performance and Underpinning Knowledge/Understanding criteria for maintaining clear and accurate communications with the crane operator, and maintaining an awareness of other ongoing operations that may affect lifting activities.

Unit 2: Prepare and sling loads

Unit 2 focuses on the **Slinger's** role – specifying the Performance and Underpinning Knowledge/Understanding criteria for establishing the weight of the load; determining and checking the lifting method, the lifting accessories; the slinging of loads, and clearing the work area.

Competence Assessment Units

UNIT 1 Direct and Control the Movement and Placing of Loads

The candidate, in the Banksman's role, will be required to perform **all** of the lifts 1 to 5 specified below - to the performance criteria specified in Element 1.1

Lift Types:

1. A simple pre-slung lift
2. A bundled tubular lift
3. A restricted access lift
4. A lift in which the load has an offset centre of gravity
5. A blind lift

ELEMENT 1.1 Direct and Control the Movement and Placement of Loads

Performance Criteria

In the **Banksman's role**, the candidate must be **assessed as competent** to perform the following:

- 1.1.1 Implementing the load-moving procedures effectively from the competent person's lifting plan and risk assessment
- 1.1.2 Discussing the lift with relevant personnel at a team briefing (TBT)
- 1.1.3 An understanding of the procedure to follow in the event of a general platform alarm
- 1.1.4 An understanding of the company procedure for environmental conditions and the limits allowed
- 1.1.5 Confirming the weight of the load
- 1.1.6 Confirming signalling and communication methods with relevant personnel
- 1.1.7 Awareness of permanent obstructions within the crane reach and working area
- 1.1.8 Installing barriers effectively to keep the lifting area clear
- 1.1.9 Checking the load rating and size of the lay down area
- 1.1.10 Checking that the pick up and lay down areas have effective exits, unobstructed access and escape routes
- 1.1.11 Visually checking the load and the lifting equipment
- 1.1.12 Ensuring the slinger has the correct lifting accessories for the load and pre-use checks have been carried out
- 1.1.13 Ensuring that personnel are in safe positions
- 1.1.14 Establishing and maintaining effective co-operation and communications with the crane operator, slingers, and if appropriate the supply vessel
- 1.1.15 Giving the signal to lift, minimally at first, to test stability
- 1.1.16 Accurately directing the load to its destination, using agreed communications
- 1.1.17 Maintaining an awareness of ongoing or adjacent activities that may affect crane operations
- 1.1.18 Monitoring the support and balance of the slung load during travel. *Continued.*

Element 1.1 continued.

- 1.1.19 Positioning and giving the signal for the crane operator to set down the load and relax the sling(s)
- 1.1.20 Effectively handing over the lift to the load handlers/slingers for them to remove the lifting equipment.

Underpinning Knowledge and Understanding Criteria:

In the **Banksman's role** - within the limits of their responsibility - the candidate must be able to **explain**:

- 1.1.21 The Banksman's responsibilities under the Health and Safety Statutory requirements
- 1.1.22 The approved procedures and practices in the context of the operations, the work activity and the workplace
- 1.1.23 How to interpret instructions for the movement of loads
- 1.1.24 How to establish the weight of loads
- 1.1.25 The relevant personnel involved in the activity and reporting lines and procedures
- 1.1.26 Unsafe areas to stand near the load
- 1.1.27 The methods used for signalling and communication
- 1.1.28 The emergency stop signal that can be given by anyone to the crane operator
- 1.1.29 Route planning methods and techniques
- 1.1.30 The reasons for wearing high-visibility clothing
- 1.1.31 Why it is important that the hook is above the load's centre of gravity
- 1.1.32 The additional considerations required for following non-standard lifts such as heavy lifts, long loads and blind lifts
- 1.1.33 The necessary considerations for working with cranes in adverse weather conditions
- 1.1.34 Areas of the site/ installation which need special consideration if a load needs to be landed near or passed close to those areas

Note: During the assessment, the candidate must take account of the relevant worksite operational requirements, procedures and safe working practices.

UNIT 2 Prepare and Sling Loads

The candidate, in the Slinger's role, will be required to perform **all** slung load types 1 to 3 specified below - to the criteria specified in Element 2.1

Types of Slung loads:

1. Prepare and sling a simple lift (not pre-slung)
2. Prepare and sling a bundle of 3 or more tubulars
3. Prepare and sling a load with an offset centre of gravity

ELEMENT 2.1 Prepare and Sling Loads

Performance Criteria:

In the **Slinger's role**, the candidate must be **assessed as competent** to perform the following:

- 2.1.1 Reviewing 'Implement Load-Moving' procedures from the competent person's lifting plan and risk assessment
- 2.1.2 Discussing the lift with relevant personnel at a TBT
- 2.1.3 Using relevant information and instruction to accurately identify the weight of the load to be moved
- 2.1.4 Choosing the slinging technique appropriate to the characteristics of the load and the intended lift
- 2.1.5 Checking the condition of the load so that it is fit to be lifted
- 2.1.6 Checking for potential dropped objects on the load
- 2.1.7 Checking that the load is free to be moved
- 2.1.8 Selecting lifting accessories and confirm that they are suitable for the load
- 2.1.9 Conducting pre-use checks of the lifting accessories
- 2.1.10 Securing the cargo within a container/half height using ratchet straps
- 2.1.11 Preparing and slinging loads appropriate to the slinging technique chosen
- 2.1.12 Attaching tag lines to the load, if required
- 2.1.13 Effectively handing over the load to the Banksman when the load is ready to be lifted
- 2.1.14 Keeping hold of the tag lines during the lift under direction from the Banksman - if tag lines have been used
- 2.1.15 Approaching the load in its final destination when signalled by the Banksman
- 2.1.16 Releasing the load and carry out post-use checks
- 2.1.17 Storing slings and lifting accessories
- 2.1.18 Disposing of wastes in accordance with site/installation procedures.

Element 2.1 Prepare and Sling Loads - continued.

Underpinning Knowledge and Understanding Criteria

In the **Slinger's role** - within the limits of their responsibility - the candidate must be able to **explain**:

- 2.1.19 The Slinger's responsibilities under the Health and Safety Statutory requirements
- 2.1.20 The approved procedures and practices in the context of the operations, the work activity and the workplace
- 2.1.21 How to interpret instructions for the movement of loads
- 2.1.22 How to establish the weight of loads
- 2.1.23 The relevant personnel involved in the activity and reporting lines and procedures
- 2.1.24 Unsafe areas to stand near the load
- 2.1.25 The colour coding and marking systems for lifting equipment and accessories, and why they are used
- 2.1.26 SWL, WLL and sling angles
- 2.1.27 Considerations to ensure load stability, security and correct weight distribution
- 2.1.28 How information on the load characteristics (e.g. hazardous and non-hazardous) should be communicated
- 2.1.29 How to use lifting accessories within their capabilities
- 2.1.30 The types of faults that are possible with lifting accessories
- 2.1.31 How to secure the cargo within container/half height using ratchet straps
- 2.1.32 How to handover effectively during lifting operations
- 2.1.33 That the emergency stop signal can be given by anyone to the crane operator
- 2.1.34 How to check slings after use
- 2.1.35 How to coil and store reusable slings after use
- 2.1.36 The reporting structure for identifying unusable lifting equipment and materials
- 2.1.37 The purpose of a rigging loft and quarantine
- 2.1.38 How to correctly store various types of lifting equipment and accessories
- 2.1.39 Appropriate locations and environmentally sound techniques for disposing of waste materials

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 is personnel that wish to renew their OPITO Stage 3 or Stage 4 competent Banksman & Slinger 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 Banksman & Slinger Certificate

B.3 Physical and Stressful demands of Stage 4 Reassessment

Banksman & Slinger practical assessments will involve work of a physically nature. Training establishments/assessment centres are required to ensure that prior to participating in practical exercises/activities; the candidates undergo an appropriate *medical screening by the Assessment Centre

*Medical screening: Candidate to complete a self-declaration of medical fitness form.

Where doubt exists regarding the medical fitness of any candidate the Training Establishment/Assessment Centre should seek the advice of a medical officer.

This information will be given to candidates along with pre-assessment instructions. The responsibility for the individual completing the assessment, without any adverse effects to their present state of health, lies with the candidate and/or company sponsoring the candidate.

Note: Practical exercises should be designed and delivered solely to meet this standard, and must not place on the candidates any physical or mental demands other than those required to meet the Standard.

B.4 Aims and objectives of Stage 4 Reassessment

The aim and objective of the OPITO Stage 4 competence reassessment is to establish that the candidate has maintained the competence requirement for the role of Banksman & Slinger.

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.

B.6 Candidate Stage 4 Reassessment

It is the responsibility of employers to ensure their banksman & slingers continue to be competent to undertake lifting operations relevant to their role.

When a Banksman & Slinger requires Stage 4 Reassessment, he/she should be assessed by a suitably [qualified assessor](#); refer to Section C.1 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 by the Assessor or [Invigilator](#).

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 banksman & slinger 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's employer with a written report identifying why the candidate was unsuccessful and suggest any further training requirement.

Assessor/Candidate Ratio

The assessor to candidate ratio will be **1:1**

Note: Banksman & Slinger candidates may be part of a team of 3 during the assessment i.e. one Banksman and two Slingers.

The maximum number of candidates attending the practical assessment is **6**.

B.7 Duration and timing of Stage 4 Reassessment

The expected duration for completing the Stage 4 assessment is approximately 7 hours

B.8 Stage 4 Competence Assessment Units

This section specifies the **practical assessment criteria** (within the Competence Assessment Units) for the Banksman & Slinger Stage 4. The Units comprise both the Performance Criteria (practical) and the inferred Underpinning Knowledge and Understanding criteria.

There are two competence units for Stage 4 practical assessment.
They are:

Unit 3: Direct and control the movement and placing of loads

Unit 3 focuses on the **Banksman's** role – specifying the performance and underpinning knowledge/understanding criteria for maintaining clear and accurate communications with the crane operator, and maintaining an awareness of other ongoing operations that may affect lifting activities.

Unit 4: Prepare and sling loads

Unit 4 focuses on the **Slinger's** role – specifying the performance and underpinning knowledge/understanding criteria for establishing the weight of the load; determining and checking the lifting method, the lifting accessories; the slinging of loads, and clearing the work area.

Stage 4 Competence Assessment Units

UNIT 3 Direct and Control the Movement and Placing of Loads

The candidate Banksman will be required to perform **all** of the lifts 1 to 5 specified below - to the Performance criteria specified in Element 3.1

Lift Types:

1. A simple pre-slung lift
2. A bundled tubular lift
3. A restricted access lift
4. A lift in which the load has an offset centre of gravity
5. A blind lift

ELEMENT 3.1 Direct and Control the Movement and Placement of Loads

Performance Criteria

In the Banksman's role, the candidate must be **assessed as competent** to perform the following:

- 3.1.1 Implementing the load-moving procedures effectively from the competent person's lifting plan and risk assessment
- 3.1.2 Discussing the lift with relevant personnel at a team briefing (TBT)
- 3.1.3 An understanding of the procedure to follow in the event of a general platform alarm
- 3.1.4 An understanding of the company procedure for environmental conditions and the limits allowed
- 3.1.5 Confirming the weight of the load
- 3.1.6 Confirming signalling and communication methods with relevant personnel
- 3.1.7 Awareness of permanent obstructions within the crane reach and working area
- 3.1.8 Installing barriers effectively to keep the lifting area clear
- 3.1.9 Checking the load rating and size of the lay down area
- 3.1.10 Checking that the pick up and lay down areas have effective exits, unobstructed access and escape routes
- 3.1.11 Visually checking the load and the lifting equipment
- 3.1.12 Ensuring the slinger has the correct lifting accessories for the load and pre-use checks have been carried out
- 3.1.13 Ensuring that personnel are in safe positions
- 3.1.14 Establishing and maintaining effective co-operation and communications with the crane operator, slingers, and if appropriate the supply vessel
- 3.1.15 Giving the signal to lift, minimally at first to test stability
- 3.1.16 Accurately directing the load to its destination, using agreed communications
- 3.1.17 Maintaining an awareness of ongoing or adjacent activities that may affect crane operations
- 3.1.18 Monitoring the support and balance of the slung load during travel

Element 3.1 continued.

- 3.1.19 Positioning and giving the signal for the crane operator to set down the load and relax the sling(s)
- 3.1.20 Effectively handing over the lift to the load handlers/slingers for them to remove the lifting equipment.

Underpinning Knowledge and Understanding Criteria:

In the **Banksman's role** - within the limits of their responsibility - the candidate must be able to **explain**:

- 3.1.21 The Banksman's responsibilities under the Health and Safety statutory requirements
- 3.1.22 The approved procedures and practices in the context of the operations, the work activity and the workplace
- 3.1.23 How to interpret instructions for the movement of loads
- 3.1.24 How to establish the weight of loads
- 3.1.25 The relevant personnel involved in the activity and reporting lines and procedures
- 3.1.26 Unsafe areas to stand near the load
- 3.1.27 The methods used for signalling and communication
- 3.1.28 The emergency stop signal that can be given by anyone to the crane operator
- 3.1.29 Route planning methods and techniques
- 3.1.30 The reasons for wearing high-visibility clothing
- 3.1.31 Why it is important that the hook is above the load's centre of gravity
- 3.1.32 The additional considerations required for following non-standard lifts such as heavy lifts, long loads and blind lifts
- 3.1.33 The necessary considerations for working with cranes in adverse weather conditions
- 3.1.34 Areas of the site/ installation which need special consideration if a load needs to be landed near or passed close to those areas

Note: During the assessment, the candidate must take account of the relevant worksite operational requirements, procedures and safe working practices.

UNIT 4 Prepare and Sling Loads

The candidate Slinger will be required to perform **all** slung load types 1 to 3 specified below - to the criteria specified in Element 4.1

Types of Slung loads:

1. Prepare and sling a simple lift (not pre-slung)
2. Prepare and sling a bundle of 3 or more tubulars
3. Prepare and sling a load with an offset centre of gravity

ELEMENT 4.1 Prepare and Sling Loads

Performance Criteria:

In the **Slinger's role**, the candidate must be **assessed as competent** to perform the following:

- 4.1.1 Reviewing 'Implement Load-Moving' procedures from the competent person's lifting plan and risk assessment
- 4.1.2 Discussing the lift with relevant personnel at a TBT
- 4.1.3 Using relevant information and instruction to accurately identify the weight of the load to be moved
- 4.1.4 Choosing the slinging technique appropriate to the characteristics of the load and the intended lift
- 4.1.5 Checking the condition of the load so that it is fit to be lifted
- 4.1.6 Checking for potential dropped objects on the load
- 4.1.7 Checking that the load is free to be moved
- 4.1.8 Selecting lifting accessories and confirm that they are suitable for the load
- 4.1.9 Conducting pre-use checks of the lifting accessories
- 4.1.10 Preparing and slinging loads appropriate to the slinging technique chosen
- 4.1.11 Securing the cargo within a container/half height using ratchet straps
- 4.1.12 Attaching tag lines to the load, if required
- 4.1.13 Effectively handing over the load to the Banksman when the load is ready to be lifted
- 4.1.14 Keeping hold of the tag lines during the lift under direction from the Banksman - if tag lines have been used
- 4.1.15 Approaching the load in its final destination when signalled by the Banksman
- 4.1.16 Releasing the load and carry out post-use checks
- 4.1.17 Storing slings and lifting accessories
- 4.1.18 Disposing of wastes in accordance with site/installation procedures.

Element 4.1 Prepare and Sling Loads - continued.

Underpinning Knowledge and Understanding Criteria

In the **Slinger's role** - within the limits of their responsibility - the candidate must be able to **explain**:

- 4.1.19 The Slingers' responsibilities under the health and safety statutory requirements
- 4.1.20 The approved procedures and practices in the context of the operations, the work activity and the workplace
- 4.1.21 How to interpret instructions for the movement of loads
- 4.1.22 How to establish the weight of loads
- 4.1.23 The relevant personnel involved in the activity and reporting lines and procedures
- 4.1.24 Unsafe areas to stand near the load
- 4.1.25 The colour coding and marking systems for lifting equipment and accessories, and why they are used
- 4.1.26 SWL, WLL and sling angles
- 4.1.27 Considerations to ensure load stability, security and correct weight distribution
- 4.1.28 How information on the load characteristics (e.g. hazardous and non hazardous) should be communicated
- 4.1.29 How to use lifting accessories within their capabilities
- 4.1.30 The types of faults that are possible with lifting accessories
- 4.1.31 Securing the cargo within a container/half height using ratchet straps
- 4.1.32 How to handover effectively during lifting operations
- 4.1.33 That the emergency stop signal can be given by anyone to the crane operator
- 4.1.34 How to check slings after use
- 4.1.35 How to coil and store reusable slings after use
- 4.1.36 The reporting structure for identifying unusable lifting equipment and materials
- 4.1.37 The purpose of a rigging loft and quarantine
- 4.1.38 How to correctly store various types of lifting equipment and accessories
- 4.1.39 Appropriate locations and environmentally sound techniques for disposing of waste materials

Note: During the assessment, the candidate must take account of the relevant worksite operational requirements, procedures and safe working practices.

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 '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 C).
- (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 there to support the programme.

Assessment centres must ensure that assessors are competent and qualified to conduct the assessment of candidates undertaking the Stage 3 & 4 Banksman & Slinger assessments.

Assessors must:

- (a) Be occupationally competent i.e. they must hold a valid industry-recognised Banksman & Slinger qualification (e.g. an OPITO B&S Stage 3) and have a minimum of 3 years experience in the Banksman & Slinger role
- (b) Hold a recognised assessor's qualification (A1, A2, D32, D33, TQFE or the OPITO approved Competence Assessor Certificate or equivalent qualification approved by OPITO)
- (c) Fully understand the Assessment Centre's assessment and internal verification processes and practices.
- (d) Fully understand the OPITO requirements for recording assessment decisions and securely maintaining accurate records of these.
- (e) Participate in regular standardisation meetings or events to ensure a consistent approach to assessment.
- (f) Undertake and record continuing professional development (CPD).

Note: During practical exercises, the Instructor cannot also simultaneously perform the role of the Crane Operator.

C.3 Facilities

Facilities may vary depending on approved center locations, however assessment facilities must be of a required standard – see below for details.

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

Practical assessment areas must be planned to accommodate the working area of the crane, the path of the load and to enable each candidate to participate fully in the following:

- (a) The Banksman's role in a simple pre-slung lift
- (b) Preparing a standard load which requires a single leg sling
- (c) Preparing a standard load which requires more than one sling
- (d) Securing the cargo within a container OR half height using ratchet straps
- (e) The Slinger's role during a free access lift, a restricted access lift, a single tubular lift, a bundled tubular lift, a load with an offset centre of gravity, a lift with a cargo carrying unit and a blind lift
- (f) The Banksman's role during a free access lift, a restricted access lift, a single tubular lift, a bundled tubular lift, a lift in which the load has an offset centre of gravity, a lift with a cargo carrying unit and a blind lift varying the use of hand signals and radio communications

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

C.4 Equipment

As a minimum, the following equipment, which must be of a type in use regionally in the oil and gas industry, is required to meet the stated content of the assessment:

- (a) Appropriate PPE (e.g. safety helmets, safety boots, eye protection, gloves, high-visibility vest and gloves)
- (b) Cranes used for the Practical Assessment should be of the pedestal or mobile type
- (c) A range of defective lifting appliances and accessories for the purposes of pre-use inspection. These should include defective chain, fibre, flat web and wire slings, shackles, cargo carrying unit, hooks; with issues of traceability e.g. no colour coding, no identification numbers and no SWL markings etc.
- (d) Areas designed to enable blind lifts
- (e) A rigging loft with the appropriate equipment control measures
- (f) Hand held radio set for banksman and crane operator
- (g) Ratchet straps, chain, fibre or wire slings
- (h) Appropriate lifting equipment and accessories
- (i) Tag lines
- (j) A variety of offshore items to be lifted including; pre-slung loads, cargo carrying units /containers, single tubulars, bundles of tubulars, and loads with an offset centre of gravity.
- (k) Suitable cargo as found offshore for securing within a container OR half height using ratchet straps
- (l) (Closed door) container OR half height to be used for the ratcheting of cargo

© OPITO

C3 Continued.

All equipment must be maintained and inspected and tested in accordance with applicable legislation and standards. Certificates and maintenance schedules should be available during OPITO audits.

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 Banksman & Slinger (Stages 3 & 4) Competence Assessment Standard* or a link to the Standard on the OPITO website.

D.2 Validity and Renewal

The **Stage 3** Certificate is valid for **two years**

The **Stage 4** Certificate is valid for **two years**

D.3 Certification and Recording

Candidates successfully meeting the OPITO-approved Stage 3 or Stage 4 Assessment Standard will be issued with an OPITO Banksman & Slinger 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 and approved by OPITO. The details of each candidate will be updated on **Vantage**, the industry's central recording data base.

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'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 also contain the following:

- (a) OPITO-approved Centre name
- (b) Full OPITO course/assessment title stating that it is OPITO-approved
- (c) OPITO registration code
- (d) Candidate's name
- (e) Course/assessment dates
- (f) Certificate expiry date
- (g) Unique Certificate Number (refer to [guide on OPITO website](#))
- (h) OPITO-approved Centre Signatory.

D.4 Assessment Administration

Each candidate undertaking any OPITO-approved assessment programme must be registered with the Central Register (CR) operated by OPITO. Registration must be made by the training establishment to OPITO within one week following the candidate's successful Stage 3 assessment or Stage 4 re-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 records. At all times use of this data will be strictly in accordance with principles laid down in applicable data protection legislation

Glossary of Terms and Abbreviations

Assessor: Suitably qualified and experienced persons 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 standards.

Candidate: An individual whose ability, knowledge and skills are assessed against the expected performance required by the relevant OPITO approved standard.

Invigilate To monitor candidates during a written test or examination to ensure there is no cheating

Heavy Lifts For cargo handling operations to and from offshore installations: any load above 7 tonnes is generally considered to be a heavy lift, and the load will be marked as such with a heavy lift flag.
For general lifting operations: a load which is greater than 75% of the SWL, at the required radius of the lifting machine, is considered to be a heavy lift.

SWL Safe Working Load

TBT Toolbox Talk

Valid Certificate An authentic certificate which is in-date i.e. has not expired

WLL Working Load Limit

Continued.

Glossary of Terms and Abbreviations - continued

Lift No	Type of Lift	Definition and examples
1	A simple pre-slung lift	A load with integral slings e.g. Cargo Carrying Unit (CCU) A simple pre-slung lift could be a load of scaffold boards which arrive inside a CCU - pre slung and ready to lift. Or, a small pump which would arrive inside a CCU - pre-slung ready to lift.
2	A free access lift	A lift in which there is easy access around the load and no restrictions for crane access and movement e.g. load in the middle of a deck etc.
3	A restricted access lift	A lift in which there are restrictions to the access of the load or restrictions to the movement of the crane e.g. restrictions around the load path as it is being lifted, or where the crane boom movement is restricted due to an overhang etc.
4	A single tubular lift	A lift in which the load comprises of a single tubular i.e. single length of drill pipe, casing or pipe spool.
5	A bundled tubular lift with hand signals	Same as Lift No4, but the load comprises of at least three tubulars, sufficient to demonstrate correct slinging technique. Example could include a bundle of scaffolding tubes.
6	A lift in which the load has an offset centre of gravity	A load which typically has an irregular shape resulting in the centre of gravity not being in the centre of the load e.g. a pressure safety valve, a drilling bit, a length of irregular-shaped pipework.
7	A lift involving a cargo carrying unit (CCU)	The lifting of a cargo carrying unit such as a standard closed door container, a half height container, chemical tanks etc.
8	A lift consisting of bulk hose handling	The lifting of flexible softwall or hardwall hose used for the transferring of large quantities of fluids such as potable water, diesel, barite, cement etc. Lift Example: Bulk hose being lifted from its stowage position down to or back from an offshore installation supply boat.
9	A blind lift	A lift in which the crane operator cannot see the load throughout the complete lifting operation e.g. the load lay-down area cannot be seen by the crane operator

Appendix 1: Stage 2 Logbook Work Experience Requirements

A fully completed and valid Stage 2 logbook must be presented to an OPITO-approved assessment centre **within two years** of the date shown on the candidate's Stage 1 Certificate, for the candidate to become eligible to take the Stage 3 Assessment.

The Logbook remains the property of the candidate at all times, but the OPITO-approved Assessment Centre will be required to retain a copy of the page/s of the completed Logbook which contains a record of signatures and contact details of senior employer representatives; this is for OPITO verification and audit purposes. During the time of the audit OPITO will inspect any complete logbooks that are available at the Assessment Centre.

The Stage 2 Logbook must record the following workplace experience:

In the Banksman role - the candidate must have directed:

- (a) A simple pre-slung lift - on three separate dates
- (b) A free access lift - on three separate dates
- (c) A restricted access lift - on three separate dates
- (d) A single tubular lift - on three separate dates
- (e) A bundled tubular lift with hand signals - on three separate dates
- (f) A lift in which the load has an offset centre of gravity - on three separate dates
- (g) A lift involving a cargo carrying unit - on three separate dates
- (h) A lift consisting of bulk hose handling - on three separate dates
- (i) A blind lift - on three separate dates

Note: For clarity, the candidate must conduct and record a total of 27 Banksman tasks.

In the Slinger role - the candidate must have prepared and slung:

- (a) A standard load using a single leg sling - on three separate dates
- (b) A standard load that required more than one sling - on three separate dates
- (c) A free access load - on three separate dates
- (d) A restricted access load- on three separate dates
- (e) A single tubular load - on three separate dates
- (f) A bundle (3 or more) of tubulars - on three separate dates
- (g) A load with an offset centre of gravity - on three separate dates
- (h) A lift involving a cargo carrying unit - on three separate dates
- (i) A load consisting of bulk hose handling - on three separate dates
- (j) A blind lift - on three separate dates

Note: For clarity, the candidate must conduct and record a total of 30 Slinger tasks.
Further details of the Stage 2 Logbook are specified in the *OPITO Banksman & Slinger Stages 1 & 2 Standard*

Appendix 2: Knowledge Assessment Questions Requirement

The knowledge assessment package will be sent to OPITO-approved centres by OPITO when they become approved to deliver the Banksman & Slinger Stages 3 & 4 Assessment.

Appendix 3: Practical Assessment Process

The practical assessment will consist of:

- (a) Confirmation of the eligibility of the candidate to undertake the practical assessment
- (b) A thorough briefing for the candidate, to include:
 - I. An introduction to the assessment plan detailing exactly what is expected of the candidate
 - II. the order in which the candidate is to carry out tasks, and
 - III. the contexts and parameters under which these are to be carried out, relevant to the assessment tasks (see below)
- (c) A lift plan made available to the candidate which has been approved by a competent person
- (d) A risk assessment for the lifting operations to be undertaken- approved by a competent person.
- (e) Feedback to the candidate following completion of the relevant practical assessment

The practical assessment will be conducted under the following contexts and parameters:

- (a) Where assessment is conducted in a realistic working environment, the tasks associated with the practical assessment must be conducted in a realistic timeframe.
- (b) The Assessor will determine a reasonable timeframe for the candidate to complete each task – taking into account worksite environment and activities.
- (c) An approved assessment checklist and record sheet will be used, and will be made available to the Assessor (Refer to Appendix 4).

Appendix 4: OPITO Stage 3 & 4 Competence Assessment Record

The following pages contain the Banksman & Slinger Stages 3 & 4 Assessment Checklists and the Assessment Record sheets.

Note: Reference numbers relate to Performance, and Underpinning Knowledge and Understanding Criteria specified in Unit's 1, 2, 3 and 4.

OPITO Banksman & Slinger Stage 3 Assessment Checklist [Banksman]						
Assessment Centre (Name)						
Assessment Centre Address						
Candidate Name		Employer		No.		
Assessor Name		Employer		No.		
Unit	1	Direct and control the movement and placement of loads			Performance	
Lift Type <input checked="" type="checkbox"/>	Simple pre-slung lift <input type="checkbox"/>	Bundled tubular lift <input type="checkbox"/>	Restricted access lift <input type="checkbox"/>	A lift in which the load has an offset centre of gravity <input type="checkbox"/>	Blind lift <input type="checkbox"/>	
Ref No.	Performance Criteria			Completed	Comments	
1.1.1	Implementing the load-moving procedures effectively from the competent person's lifting plan and risk assessment					
1.1.2	Discussing the lift with relevant personnel at team briefing (TBT)					
1.1.3	An understanding of the procedures to follow in the event of a general platform alarm					
1.1.4	An understanding of the company procedure for environmental conditions and the limits allowed					
1.1.5	Confirm the weight of the load					
1.1.6	Confirming signalling and communication methods with relevant personnel					
1.1.7	Awareness of permanent obstructions within the crane reach and working area					
1.1.8	Installing barriers effectively to keep lifting area clear					
1.1.9	Checking the load rating and size of the lay-down area					
1.1.10	Checking that pick up and lay down areas have effective exits, unobstructed access and escape routes					
1.1.11	Visually checking the load and the lifting equipment					
1.1.12	Ensuring the Slinger has the correct lifting accessories for the load and pre-use checks have been carried out					
1.1.13	Ensuring that personnel are in safe positions					
1.1.14	Establishing and maintaining effective co-operation and communications with the crane operator, slingers and - if appropriate - the supply vessel					
1.1.15	Giving the signal to lift, minimally at first, to test stability					
1.1.16	Accurately directing the load to its destination, using agreed communications.					
1.1.17	Maintaining an awareness of ongoing or adjacent activities that might effect crane operations					
1.1.18	Monitoring the support and balance of the slung load during travel					
1.1.19	Positioning and giving the signal for the crane operator to set down the load and relax the sling(s)					
1.1.20	Effectively handing over the lift to the load handlers/slingers for them to remove the lifting equipment.					
Assessor Signature				Assessment Date		

OPITO Banksman & Slinger Stage 3 Assessment Checklist [Banksman]						
Assessment Centre (Name)						
Assessment Centre Address						
Candidate Name		Employer		No.		
Assessor Name		Employer		No.		
Unit	1	Direct and control the movement and placement of loads			Underpinning Knowledge & Understanding	
Lift Type <input checked="" type="checkbox"/>	Simple pre-slung lift <input type="checkbox"/>	Bundled tubular lift <input type="checkbox"/>	Restricted access lift <input type="checkbox"/>	A lift in which the load has an offset centre of gravity <input type="checkbox"/>	Blind lift <input type="checkbox"/>	
Ref No.	Underpinning Knowledge and Understanding Criteria		Completed	Comments		
1.1.21	The Banksman responsibilities under the Health and Safety Statutory requirements					
1.1.22	The approved procedures and practices in the context of the operations, the work activity and the workplace					
1.1.23	How to interpret instructions for the movements of loads					
1.1.24	How to establish the weight of the loads					
1.1.25	The relevant personnel involved in the activity and reporting lines and procedures					
1.1.26	Unsafe areas to stand near the load					
1.1.27	The methods used for signalling and communication					
1.1.28	The emergency stop signal that can be given by anyone to the crane operator					
1.1.29	Route planning methods and techniques					
1.1.30	The reasons for wearing high-visibility clothing					
1.1.31	Why it is important that the hook is above the load's centre of gravity					
1.1.32	The additional considerations required for following non-standard lifts such as heavy lifts , long loads and blind lifts					
1.1.33	The necessary considerations for working with cranes in adverse weather conditions					
1.1.34	Areas of the site/installation which need special consideration if a load needs to be landed near or passed close to those areas					
Assessor Signature			Assessment Date			

OPITO Banksman & Slinger Stage 3 Assessment Checklist [Slinger]				
Assessment Centre (Name)				
Assessment Centre Address				
Candidate Name		Employer	No.	
Assessor Name		Employer	No.	
Unit	2	Prepare and Sling loads		Performance
Slinger Task-type: <input checked="" type="checkbox"/>	1.Simple lift – not pre-slung <input type="checkbox"/>	2. A bundle of 3 or more tubulars <input type="checkbox"/>	3. load with an offset centre of gravity <input type="checkbox"/>	
Ref. No	Performance Criteria	Completed	Comments	
2.1.1	Reviewing 'Implemented load-moving' procedures from the competent person's lifting plan and risk assessment			
2.1.2	Discussing the lift with relevant personnel at a TBT			
2.1.3	Using relevant information and instruction to accurately identify the weight of the load to be moved.			
2.1.4	Choosing the slinging technique appropriate to the characteristics of the load and the intended lift			
2.1.5	Checking the condition of the load so that it is fit to be lifted			
2.1.6	Checking for potential dropped objects on the load			
2.1.7	Checking that the load is free to moved			
2.1.8	Selecting lifting accessories and confirm that they are suitable for the load			
2.1.9	Conducting pre-use checks of lifting accessories			
2.1.10	Securing the cargo within a container/half height using ratchet straps			
2.1.11	Preparing and slinging loads appropriate to the slinging technique chosen			
2.1.12	Attaching tag lines to the load, if required			
2.1.13	Effectively handing over the load to the Banksman when the load was ready to be lifted			
2.1.14	Keeping hold of the tag lines during the lift under direction from the Banksman - if tag lines have been used			
2.1.15	Approaching the load in its final destination when signalled by the Banksman			
2.1.16	Releasing the load and carry out post-use checks			
2.1.17	Storing slings and lifting accessories			
2.1.18	Disposing of waste in accordance with site/installation procedures			
Assessor Signature			Assessment Date	

OPITO Banksman & Slinger Stage 3 Assessment Checklist [Slinger]					
Assessment Centre (Name)					
Assessment Centre Address					
Candidate Name		Employer		No.	
Assessor Name		Employer		No.	
Unit	2	Prepare and Sling loads			Underpinning Knowledge & Understanding
Slinger Task-type: <input checked="" type="checkbox"/>	1. Simple lift – not pre-slung <input type="checkbox"/>	2. A bundle of 3 or more tubulars <input type="checkbox"/>	3. load with an offset centre of gravity <input type="checkbox"/>		
Ref. No	Performance Criteria	Completed	Comments		
2.1.19	The Slinger's responsibilities under the Health and Safety Statutory requirements				
2.1.20	The approved procedures and practices in the context of the operations, the work activity and the workplace				
2.1.21	How to interpret instructions for the movements of loads				
2.1.22	How to establish the weight of the loads				
2.1.23	The relevant personnel involved in the activity and reporting lines and procedures				
2.1.24	Unsafe areas to stand near the load				
2.1.25	The colour coding and marking systems for lifting equipment and accessories, and why they are used				
2.1.26	SWL, WLL and sling angles				
2.1.27	Considerations to ensure load stability, security and correct weight distribution				
2.1.28	How information on the load characteristics(e.g. hazardous and non-hazardous) should be communicated				
2.1.29	How to use lifting accessories within their capabilities				
2.1.30	The type of faults that are possible with lifting accessories				
2.1.31	How to secure the cargo within container/half height using ratchet straps				
2.1.32	How to handover effectively during lifting operations				
2.1.33	That the emergency stop signal can be given by anyone to the crane operator				
2.1.34	How to check slings after use				
2.1.35	How to coil and store reusable slings after use				
2.1.36	The reporting structure for identifying unusable lifting equipment and materials				
2.1.37	The purpose of the rigging loft and quarantine procedures				
2.1.38	How to correctly store various types of lifting equipment and accessories				
2.1.39	Appropriate locations and environmental sound techniques for disposing of waste materials				
Assessor Signature			Assessment Date		

OPITO Banksman & Slinger Stage 4 Assessment Checklist [Banksman]						
Assessment Centre (Name)						
Assessment Centre Address						
Candidate Name		Employer		No.		
Assessor Name		Employer		No.		
Unit	3	Direct and control the movement and placement of loads			Performance	
Lift Type <input checked="" type="checkbox"/>	Simple pre-slung lift <input type="checkbox"/>	Bundled tubular lift <input type="checkbox"/>	Restricted access lift <input type="checkbox"/>	A lift in which the load has an offset centre of gravity <input type="checkbox"/>	Blind lift <input type="checkbox"/>	
Ref No.	Performance Criteria			Completed	Comments	
3.1.1	Implementing the load-moving procedures effectively from the competent person's lifting plan and risk assessment					
3.1.2	Discussing the lift with relevant personnel at team briefing (TBT)					
3.1.3	An understanding of the procedures to follow in the event of a general platform alarm					
3.1.4	An understanding of the company procedure for environmental conditions and the limits allowed					
3.1.5	Confirm the weight of the load					
3.1.6	Confirming signalling and communication methods with relevant personnel					
3.1.7	Awareness of permanent obstructions within the crane reach and working area					
3.1.8	Installing barriers effectively to keep lifting area clear					
3.1.9	Checking the load rating and size of the lay-down area					
3.1.10	Checking that pick up and lay down areas have effective exits, unobstructed access and escape routes					
3.1.11	Visually checking the load and the lifting equipment					
3.1.12	Ensuring the Slinger has the correct lifting accessories for the load and pre-use checks have been carried out					
3.1.13	Ensuring that personnel are in safe positions					
3.1.14	Establishing and maintaining effective co-operation and communications with the crane operator, slingers and - if appropriate - the supply vessel					
3.1.15	Giving the signal to lift, minimally at first, to test stability					
3.1.16	Accurately directing the load to its destination, using agreed communications.					
3.1.17	Maintaining an awareness of ongoing or adjacent activities that might effect crane operations					
3.1.18	Monitoring the support and balance of the slung load during travel					
3.1.19	Positioning and giving the signal for the crane operator to set down the load and relax the sling(s)					
3.1.20	Effectively handing over the lift to the load handlers/slingers for them to remove the lifting equipment.					
Assessor Signature				Assessment Date		

OPITO Banksman & Slinger Stage 4 Assessment Checklist [Banksman]						
Assessment Centre (Name)						
Assessment Centre Address						
Candidate Name		Employer		No.		
Assessor Name		Employer		No.		
Unit	3	Direct and control the movement and placement of loads			Underpinning Knowledge & Understanding	
Lift Type <input checked="" type="checkbox"/>	Simple pre-slung lift <input type="checkbox"/>	Bundled tubular lift <input type="checkbox"/>	Restricted access lift <input type="checkbox"/>	A lift in which the load has an offset centre of gravity <input type="checkbox"/>	Blind lift <input type="checkbox"/>	
Ref No.	Underpinning Knowledge and Understanding Criteria		Completed	Comments		
3.1.21	The Banksman responsibilities under the Health and Safety Statutory requirements					
3.1.22	The approved procedures and practices in the context of the operations, the work activity and the workplace					
3.1.23	How to interpret instructions for the movements of loads					
3.1.24	How to establish the weight of the loads					
3.1.25	The relevant personnel involved in the activity and reporting lines and procedures					
3.1.26	Unsafe areas to stand near the load					
3.1.27	The methods used for signalling and communication					
3.1.28	The emergency stop signal that can be given by anyone to the crane operator					
3.1.29	Route planning methods and techniques					
3.1.30	The reasons for wearing high-visibility clothing					
3.1.31	Why it is important that the hook is above the load's centre of gravity					
3.1.32	The additional considerations required for following non-standard lifts such as heavy lifts , long loads and blind lifts					
3.1.33	The necessary considerations for working with cranes in adverse weather conditions					
3.1.34	Areas of the site/installation which need special consideration if a load needs to be landed near or passed close to those areas					
Assessor Signature			Assessment Date			

OPITO Banksman & Slinger Stage 4 Assessment Checklist [Slinger]					
Assessment Centre (Name)					
Assessment Centre Address					
Candidate Name		Employer		No.	
Assessor Name		Employer		No.	
Unit	4	Prepare and Sling loads			Performance
Slinger Task-type: <input checked="" type="checkbox"/>	1.Simple lift – not pre-slung <input type="checkbox"/>	2. A bundle of 3 or more tubulars <input type="checkbox"/>	3. load with an offset centre of gravity <input type="checkbox"/>		
Ref. No	Performance Criteria	Completed	Comments		
4.1.1	Reviewing 'Implemented load-moving' procedures from the competent person's lifting plan and risk assessment				
4.1.2	Discussing the lift with relevant personnel at a TBT				
4.1.3	Using relevant information and instruction to accurately identify the weight of the load to be moved.				
4.1.4	Choosing the slinging technique appropriate to the characteristics of the load and the intended lift				
4.1.5	Checking the condition of the load so that it is fit to be lifted				
4.1.6	Checking for potential dropped objects on the load				
4.1.7	Checking that the load is free to moved				
4.1.8	Selecting lifting accessories and confirm that they are suitable for the load				
4.1.9	Conducting pre-use checks of lifting accessories				
4.1.10	Preparing and slinging loads appropriate to the slinging technique chosen				
4.1.11	Securing the cargo within a container/half height using ratchet straps				
4.1.12	Attaching tag lines to the load, if required				
4.1.13	Effectively handing over the load to the Banksman when the load was ready to be lifted				
4.1.14	Keeping hold of the tag lines during the lift under direction from the Banksman - if tag lines have been used				
4.1.15	Approaching the load in its final destination when signalled by the Banksman				
4.1.16	Releasing the load and carry out post-use checks				
4.1.17	Storing slings and lifting accessories				
4.1.18	Disposing of waste in accordance with site/installation procedures				
Assessor Signature			Assessment Date		

OPITO Banksman & Slinger Stage 4 Assessment Checklist [Slinger]					
Assessment Centre (Name)					
Assessment Centre Address					
Candidate Name		Employer		No.	
Assessor Name		Employer		No.	
Unit	4	Prepare and Sling loads			Underpinning Knowledge & Understanding
Slinger Task-type: <input checked="" type="checkbox"/>	1. Simple lift – not pre-slung <input type="checkbox"/>	2. A bundle of 3 or more tubulars <input type="checkbox"/>	3. load with an offset centre of gravity <input type="checkbox"/>		
Ref. No	Performance Criteria	Completed	Comments		
4.1.19	The Slinger's responsibilities under the Health and Safety Statutory requirements				
4.1.20	The approved procedures and practices in the context of the operations, the work activity and the workplace				
4.1.21	How to interpret instructions for the movements of loads				
4.1.22	How to establish the weight of the loads				
4.1.23	The relevant personnel involved in the activity and reporting lines and procedures				
4.1.24	Unsafe areas to stand near the load				
4.1.25	The colour coding and marking systems for lifting equipment and accessories, and why they are used				
4.1.26	SWL, WLL and sling angles				
4.1.27	Considerations to ensure load stability, security and correct weight distribution				
4.1.28	How information on the load characteristics(e.g. hazardous and non-hazardous) should be communicated				
4.1.29	How to use lifting accessories within their capabilities				
4.1.30	The type of faults that are possible with lifting accessories				
4.1.31	Securing the cargo within a container/half height using ratchet straps				
4.1.32	How to handover effectively during lifting operations				
4.1.33	That the emergency stop signal can be given by anyone to the crane operator				
4.1.34	How to check slings after use				
4.1.35	How to coil and store reusable slings after use				
4.1.36	The reporting structure for identifying unusable lifting equipment and materials				
4.1.37	The purpose of the rigging loft and quarantine procedures				
4.1.38	How to correctly store various types of lifting equipment and accessories				
4.1.39	Appropriate locations and environmental sound techniques for disposing of waste materials				
Assessor Signature			Assessment Date		

OPITO Banksman & Slinger Stages 3 & 4 Assessment Record (Banksman)						
Assessment Centre (Name)						
Assessment Centre Address						
Candidate Name		Employer		No.		
Assessor Name		Employer		No.		
Unit	*1	*3	*Delete as applicable		Banksman role	
Unit Title	Direct and control the movement and placement of loads					
Assessor comments	I can confirm that the candidate *has met / has not met the assessment criteria for this Unit *Delete as applicable					
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.						
Assessor						
Sign						
Date						
Candidate						
Candidate comments						
Sign						
Date						

OPITO Banksman & Slinger Stages 3 & 4 Assessment Record (Slinger)						
Assessment Centre (Name)						
Assessment Centre Address						
Candidate Name		Employer		No.		
Assessor Name		Employer		No.		
* Unit	2	4	*Delete as applicable		Slinger role	
Unit Title	Prepare and Sling loads					
Assessor comments	I can confirm that the candidate *has met / has not met the assessment criteria for this Unit *Delete as applicable					
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.						
Assessor						
Sign						
Date						
Candidate						
Candidate comments						
Sign						
Date						