

PHW SERVICES VQ SYSTEM

MASTER SPECIFICATION & OPERATING MANUAL

The single controlling document for all PHW plant and equipment qualifications. Supersedes all earlier framework versions and separate notes.

Covering: Telescopic Handler A17 · Counterbalance Forklift A16 · Rough Terrain Masted Forklift A14 · MEWP Scissor 3a and Boom 3b · 360 Excavator <12t · Lorry Loader A36 · Slinger/Signaller A40 · Abrasive Wheels

Document ref: PHW-VQ-00 · Version 2.1 · 23 August 2026

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1. What this system is — and what it is not

The PHW Competence Based Vocational Qualification (VQ) is structured basic operator training with formal theory and practical assessment, delivered and assessed by a qualified instructor/assessor, and backed by a complete written evidence file for every certificate issued.

It IS

- Evidence of "adequate training" under PUWER 1998 regulation 9 — the actual legal test for operating work equipment.
- For lift trucks and telehandlers, the basic training stage described in HSE ACOP L117; for MEWPs, competence under the Work at Height Regulations 2005.
- Worked to the outcomes of National Occupational Standards and the formerly regulated national units from which the unit wording derives.
- Fully auditable: every unit on a certificate traces to recorded questioning, a marked handwritten test paper and a signed practical checklist, retained for the certificate life plus 3 years.

It is NOT

- A regulated qualification (NVQ/RQF) or issued under any awarding organisation.
- A CPCS, NPORS, RTITB, ITSSAR, AITT or IPAF card, and no equivalence to those schemes is claimed.
- Authorisation to operate by itself — the employer must complete specific job training, familiarisation and written authorisation.

Where a principal contractor requires a scheme card as a site-access rule, that requirement stands regardless of this VQ. Say so plainly; do not talk around it.

2. Legal basis

There is no statutory universal "plant licence" or "forklift licence" for workplace use in the UK. The legal requirement is operator competence established through adequate training, and employer authorisation in writing.

- Health and Safety at Work etc. Act 1974 — ss.2, 3 (employer: information, instruction, training, supervision) and s.7 (employee duties).
- PUWER 1998 reg. 9 — adequate training in the equipment, the risks arising and the precautions to be taken. Reg. 4 (suitability), reg. 5 (maintenance), reg. 11 (dangerous parts) also engage for abrasive wheels.
- LOLER 1998 — lifting operations planned by a competent person and supervised; thorough examination at least every 12 months, or 6 months where the equipment lifts persons (MEWPs).
- HSE ACOP L117 (Rider-operated lift trucks) — three training stages, records kept, written authorisation issued. Covers counterbalance trucks and telescopic materials handlers.
- Work at Height Regulations 2005 — MEWP work planned, supervised, competent operators, rescue plan in place.
- HSG47 (underground services) and GS6 (overhead lines) — excavator and lorry loader operations.
- Guidance: INDG462 (lift-truck training), INDG401 (MEWP safe use), HSE abrasive wheels guidance.

3. The eight qualifications

Ref	Qualification	Units	Theory test	Typical duration	Certificates
A17	Telescopic Handler — all sizes incl. 360 slew	12	72 (pass 58)	3–5 days novice · 1–2 refresher	Award + Unit Credit
A16	Counterbalance Forklift — up to 4500 kg, diesel/gas/electric	12	71 (pass 57) + 3 quiz sets	3–5 days novice · 1 refresher	Award + Unit Credit
A14	Rough Terrain Masted Forklift — all sizes	12	71 (pass 57)	3–5 days novice · 1–2 refresher	Award + Unit Credit
MEWP	Mobile Elevating Work Platform — 3a scissor / 3b boom	8	63 (pass 51) + 10 boom supp.	1 day (both categories)	Award + Unit Credit (per category)
EXC360	360 Excavator — below 12 tonnes	13	40 (pass 32)	5–10 days novice · 2–3 experienced	Award + Unit Credit
A36	Lorry Loader Crane — hook / clamshell / clamp	14	73 (pass 59)	2–5 days by experience	Award + Unit Credit
A40	Slinger / Signaller — endorsement A, all types all duties	7 (CITB units, 43 credits)	45 (pass 36)	2–3 days	Award + Unit Credit
AW	Abrasive Wheels — mounting and use	n/a (5 topics)	35 (pass 28)	½–1 day	Award only

Pass mark is 80% throughout, and every question flagged [SC] (safety-critical) must be answered correctly regardless of total score. Any dangerous act in the practical terminates the assessment — automatic refer.

Unit numbering — read this before questioning a certificate

Unit reference numbers are PHW internal references. The same number is deliberately reused across machine categories carrying different unit titles: 7513 is "Unload the container..." on forklift/telehandler certificates, "Dangers of underground services..." on the excavator, and "Principal components, controls and terminology" on the lorry loader. This is legitimate internal numbering. The UNIT TITLE, not the number, defines what was assessed — certificates must always carry titles in full and must never cite a number alone.

Where a unit derives from a national source the lineage is documented in the machine evidence pack (e.g. 1072 from K/502/1072 and NOS SFL15; 9451 from A/601/9451 and NOS SFLDGV6). Those national units were withdrawn when the QCF closed; they are the technical basis of the content, not a claim of current accreditation.

4. Correction of record — August 2026

A verification of every unit reference against the Ofqual, NOCN and NOS registers was completed on 18 August 2026. Findings and actions:

Item	Finding	Action taken
Unload unit (FLT / telehandler)	Certificates showed 7513; the national unit the wording derives from is Y/503/7784. 7513 was a numbering slip.	Corrected to 7784 in the Pages certificate masters and throughout the evidence system. Certificates issued before Aug 2026 (Ratcliffe, Hopkinson, Cohen) carry 7513 — this entry is the record explaining them.
Unit 6831	No external lineage exists.	Retained as a declared PHW-internal unit; documented as such.
"A17 all sizes incl. 360 slew"	CPCS split this scope on 28 March 2018; 360-slew is now category A77.	PHW certificates state machine scope in words rather than relying on a scheme category label.
"OCR accredited" in certificate footer	OCR no longer awards in this area — the claim was unsupportable.	Removed from the Pages masters. Footer now reads "ACCREDITED INSTRUCTOR/ASSESSOR/VERIFIER"; state the actual assessor awards held.
Typography	"ACCREDITED" and "aTelescopic" errors in masters and templates.	Fixed in both Pages masters and all certificate templates.

5. Assessment method — identical across all eight qualifications

Component 1 — Unit knowledge and understanding

Questions from the unit K&U bank are put verbally or in writing during training. The assessor records what was asked, judges the responses against the model answers, and signs off each unit with the candidate. All units must be achieved.

Component 2 — Technical theory test

The candidate answers the full question paper in their own handwriting. The Operator's Manual for the training machine must be available for the questions that require it, along with the capacity chart where applicable. 80% pass, all [SC] questions correct. Referred candidates may re-sit after further training; the re-sit is recorded on a fresh marking sheet.

Component 3 — Practical assessment

Structured exercises assessed against observed performance criteria, marked competent / not yet competent. Every criterion must reach competent. The machine make, model, attachments and site conditions are recorded on the practical record.

Certification decision

The VQ is awarded only when all units are signed off, the theory test is passed and every practical exercise is competent. The award is not graded. The evidence file must be complete before certificates are issued.

6. The document set — every qualification has the same eight components

Document	Contains	Who uses it
Evidence Pack	Machine background, unit K&U banks with model answers, full theory test with answers, practical checklists	Assessor master — never issue to candidates
Theory Test — Candidate Paper	Questions only, blank writing space	Handed to candidate; answers handwritten in ink
Theory Test — Answer Key	Full Q&A, [SC] flags, pass mark	Assessor
Marking Crib	Answers only, numbered to the paper	Assessor — quick marking
Assessment Records (Signature Set)	Unit sign-offs, theory marking record, practical exercise tables, certification decision	Signed by candidate + assessor
Signature Checklist	Tick-box index of every signature required	Assessor — file completeness check
Site Verification Statement	Legal basis, theory + practical detail, competence decision, audit trail	Given to site H&S teams
Award Certificate / Unit Credit Certificate	Editable certificate templates in the phwservices house format	Issued on successful completion

Two shared documents serve all qualifications: the Candidate Information Sheet (issued at the start of the course) and the Employer & Site Credibility Sheet (the myth-buster and audit-trail summary for clients and principal contractors).

7. From basic training to lawful operation

Stage	Content	Who / record
1. Basic training	Off-the-job skills and knowledge for the machine type — the PHW VQ.	PHW Services; VQ certificates + evidence file
2. Specific job training	The employer's machine, attachments, site rules, actual tasks, risk assessments and method statements.	Employer (PHW can deliver under contract); Specific Job Training Record
3. Familiarisation	Supervised operation under normal working conditions until fluent.	Employer supervisor; Familiarisation Record
4. Written authorisation	Employer authorises the named operator for named machines and tasks. Competence is complete only here.	Employer; Written Authorisation to Operate

Refresher/reassessment recommended at 3–5 years, and sooner on: incident or near miss, observed unsafe practice, change of machine or attachments, significant change of task or environment, or a long break from operating.

8. Commercial position

The VQ carries no card-scheme fees or test-centre overhead, so it undercuts scheme courses while protecting margin. Market rates checked 19 August 2026: telehandler novice £900–£1,700 (avg ~£1,250) and refresher £300–£550; forklift novice £450–£750 and refresher £180–£250; MEWP 3a/3b £150–£300; excavator novice £1,000–£3,000 and experienced £600–£1,295.

- The margin is in NOVICE courses — a 3-day novice telehandler at £750–£900 per head undercuts the market average and pays far better per delivery day than refresher work.
- Existing PHW refresher pricing sits at the bottom of the market; there is headroom to £200–£250 per head without losing the competitive position.
- Quote durations honestly — every assessment component must genuinely be completed, so a one-day "novice" course is not defensible against the paperwork this system produces.

9. Rules that must not drift

- The phwservices Award and Unit Credit certificate layout is the house format. Never redesign it.
- Unit titles in full on every certificate; numbers are secondary and are internal references.
- Never claim accreditation, scheme membership or card equivalence that cannot be evidenced.
- Never issue certificates before the evidence file is complete and signed.
- Candidate papers are issued blank — answers are handwritten by the candidate in ink, never pre-printed.
- Keep plant competence, road-driving entitlement, street works and lift planning as separate matters; none substitutes for another.

Document control

Field	Detail
Document	PHW-VQ-00 v2.1 — Master Specification & Operating Manual
Status	Controlling document. Supersedes v2.0 (six qualifications) and consolidates all separate framework, pricing and correction notes.
Date	23 August 2026
Owner	Adrian Whetton, PHW Services
Qualifications covered	A17 · A16 · A14 · MEWP 3a/3b · EXC360 · A36 · A40 · Abrasive Wheels
Companion	PHW-VQ-01 Course & Competence Records (forms for stages 2–4) · per-qualification evidence packs and file sets · README.md index
Review	On change of legislation or ACOP, on adding a qualification, or at 2 years

Approved by (name)	Signature	Date