

COURSE & COMPETENCE RECORDS

PHW Services VQ System — All Machine Categories

Enrolment · Attendance · Specific Job Training · Familiarisation · Written Authorisation · Refresher ·
Certificate Log

Document ref: PHW-VQ-01 · Version 1.0 — August 2026

Print or duplicate each form per candidate. Completed forms belong in the candidate file (see PHW-VQ-00 §6).

Form 1 — Candidate enrolment

Field	Entry
Candidate full name	
Date of birth	
Employer / company	
Employer contact & phone	
Machine category applied for (state in words, incl. attachments)	
Previous experience on this machine type (years / hours / cards or certificates held)	
Relevant medical conditions declared (fitness to operate)	
Driving licence held (only relevant to highway travel)	
Course dates	
Training site / location	
Machine make & model to be used	
Instructor/assessor	

Candidate declaration: the information above is correct; I will follow all instructions given during training and report any health condition affecting safe operation.

Candidate signature	Date

Form 2 — Attendance record

Field	Entry
Course reference	
Machine category	
Instructor/assessor	

Date	Session content delivered	Candidate initials	Instructor initials

Form 3 — Specific job training record (employer stage)

Completed by or for the employer AFTER basic training. Covers the employer's own machine, site and tasks. Required by HSE ACOP L117 before authorisation.

Field	Entry
Operator name	
Employer	
Site / location	
Machine make & model / fleet number	
Attachments covered	
Site rules and traffic routes briefed	
Site risk assessments / method statements briefed	
Task-specific instruction given (describe tasks)	
Emergency procedures briefed	
Delivered by (name & role)	
Date(s)	

Trainer/supervisor signature	Operator signature	Date

Form 4 — Familiarisation record (supervised operation)

Supervised on-the-job operation under normal working conditions until the operator is fluent. Log each supervised session below.

Date	Tasks performed under supervision	Duration	Supervisor comments	Initials

Familiarisation complete — the operator works confidently and safely under normal conditions:

Supervisor name & signature	Operator signature	Date

Form 5 — Written authorisation to operate

Issued by the EMPLOYER. HSE ACOP L117 states operators should not operate lift trucks without the employer's written authority, given only after the three training stages are complete. Keep the original with the employer; copy to the candidate file.

Field	Entry
Employer / company	
Operator name	
Machine type(s) authorised (state in words, incl. attachments and any limits)	
Machine make(s)/model(s) or fleet numbers covered	
Tasks / areas authorised	
Exclusions (e.g. suspended loads, work platforms, highway travel)	
Basic training evidence (PHW VQ certificate ref & date)	
Specific job training completed (date)	
Familiarisation completed (date)	
Authorisation valid from	
Review / refresher due (recommended 3–5 years)	

I authorise the named operator to operate the machine type(s) stated above on behalf of this company. This authorisation will be reviewed on any incident, change of machine or task, observed unsafe practice, or at the review date.

Authorising manager (name & role)	Signature	Date

Form 6 — Refresher recommendation

Field	Entry
Operator name	
Machine category	
VQ certificate date	
Recommended refresher due date (3–5 years from award)	
Earlier triggers (incident/near miss · unsafe practice · machine or task change · long break)	
Monitoring arrangements recommended to employer	

Instructor/assessor signature	Date

Form 7 — Certificate issue log (provider copy)

Cert no.	Candidate	Machine category	Award date	Certificates issued (Award / Unit Credit)

Retention: candidate files kept for the life of the certificate plus 3 years (PHW-VQ-00 §6).