



Product title: Banksman & Slinger Competence Assessment (previously stage 3)

Product code: 9068

Product type: OPITO Standard

Product category: Oil and Gas / Technical Roles

Date of last update: 19/05/2023 - Date of last update field added to product spec

Who is the Product for?

This Product is for 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 Banksman and Slinger Competence Assessment.

What does this Product cover?

This Product is to establish that the learner has the required underpinning knowledge, understanding and practical skills to fulfill the role of Banksman & Slinger safely and effectively.

How can you successfully achieve this Product?

To achieve the OPITO Banksman & Slinger Competence Assessment the learner will need to complete the 4 mandatory units

What could this Product lead to?

Banksman & Slinger Competence Reassessment

Please refer to Banksman & Slinger Training and Assessment Framework also.

What are the entry requirements?

Learners must possess:

Option 1

(a) A valid OPITO-approved Banksman and Slinger Initial Training Certificate

And

(b) A fully completed and valid OPITO Banksman and Slinger Workplace Experience Logbook and supporting evidence for each of the 10 tasks*, such as a copy of the lifting plan, permit, or toolbox talk, based on the

OPITO Banksman and Slinger Initial Training Standard and Banksman and Slinger Workplace Experience Logbook requirements. The logbook must be signed as true and valid by the employing company head of discipline or the employing company discipline manager and confirmed by the Centre as being present and correct prior to assessment taking place.

*Supporting evidence is not required for learners who completed the Initial Training Standard (previously Stage 1) **between February 29th, 2020, and February 28th, 2022.**

Or

(c) If a learner completed the Initial Training Standard (previously Stage 1) **between February 29th, 2020, and February 28th, 2022** and does not have a completed Workplace Experience Logbook, a formal letter from a current employer, meeting the below criteria, may be accepted.

The letter **must**:

- 1) Be on company letterhead
- 2) State that the learner has met the equivalent of the OPITO (previously Stage 2) Workplace Experience Logbook criteria
- 3) 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
- 4) Be sent directly from the employer to the Centre prior to assessment and not provided by the Learner

Option 2

(d) An OPITO Approved Banksman and Slinger Competence Assessment or Re-Assessment Certificate awarded with the previous 30 months.

Option 3

(e) Evidence that they have been assessed as competent and have achieved an equivalent qualification/certification by a nationally recognised awarding body, awarded within the previous 30 months**.

Please note that after two years the certificate would no longer be valid (see Note 1 below).

Note 1: Learners who possess an OPITO Banksman and Slinger Assessment or Re-Assessment Certificate which has expired by more than 6 months will be required to attend the OPITO Banksman and Slinger Initial Training prior to undertaking the Banksman and Slinger Competence Assessment. In these instances, there will be no requirement to complete a Work Experience Logbook. Banksman and Slinger Competence Assessment/Reassessment Standard

**It is the responsibility of the Centre to confirm and demonstrate appropriate recognition and equivalency of the Learner's qualification/certification.

Medical entry requirements

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

Therefore, OPITO-approved Centres are required, to ensure that prior to participating in practical exercises the learner undergoes medical screening by completing an appropriate medical screening form provided by the OPITO-approved Centre

The OPITO-approved Centre shall keep a record of the learner'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 learner will be asked to perform, will be given to learners by the OPITO-approved Centre and, if applicable, to their sponsoring company as part of the joining instructions. The responsibility for declaring any current or pre-existing medical

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conditions that could have adverse effects to the individual's state of health while undertaking the training and/or assessment activities lies with the learner and/or company sponsoring the learner.

Where doubt exists regarding the fitness of any learner, 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 Product, and must not place on the learners any demands other than those required to meet the Product.

Country Specific if applicable?

N/A

How is this Product assessed?

Learners will be assessed against the outcomes specified in accordance with the assessment guidance detailed in each unit.

If unsuccessful learner must retake the OPITO Banksman and Slinger Competence Assessment. Learner's employer to decide how to address the competence gap to allow the Banksman and Slinger to continue in the role.

Are there any ratios that must be adhered to for the delivery of this Product?

The assessor to learner ratio will be is **1:1** [assessor to learners]

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

The maximum number of learners attending the practical assessment is **6**

What are the Guided Learning Hours?

7 hours

What staff resources are required to deliver this Product?

Assessors must:

- (a) Be occupationally competent
- (b) Assessors must hold an industry-recognised assessor 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.

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- (f) Participate in regular standardisation meetings or events to ensure a consistent approach to assessment.
- (g) Undertake and record continuing professional development (CPD).

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

What facilities and equipment are required to deliver this Product?

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 Centres must comply with the following requirements:

- (a) Prior to initial approval, the 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 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.
- (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 the remote sites operated by the Centre at any time

Facilities

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

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

- (1) The Banksman's role in a simple pre-slung lift
- (2) Preparing a standard load which requires a single leg sling
- (3) Preparing a standard load which requires more than one sling
- (4) Preparing a load to be lifted using manmade fibre slings
- (5) Securing the cargo within a container OR half height using ratchet straps
- (6) 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
- (7) 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

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

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:

- (1) Appropriate PPE (e.g., safety helmets, safety boots, eye protection, gloves, high-visibility vest and gloves)
- (2) Crane (Cranes used for the lifting activities associated with the equipment items listed below should be of the pedestal or mobile type and fitted with a boom which is compatible to the operational requirements in the environment which the crane will be operating, e.g., for offshore applications this length will not be less than 100 feet (30 metres))
- (3) 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.
- (4) Areas designed to enable blind lifts
- (5) A rigging loft with the appropriate equipment control measures
- (6) Handheld radio set for banksman and crane operator
- (7) Ratchet straps, chain, manmade fibre and wire slings
- (8) Appropriate lifting equipment and accessories
- (9) Tag lines
- (10) Handsfree lifting tools (where applicable)
- (11) 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.
- (12) Suitable cargo as found offshore for securing within a container OR half height using ratchet straps
- (13) (Closed door) container OR half height to be used for the ratcheting of cargo

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 monitoring.

What is the validity of this Product?

2 years

Please note: If the expiry date on the learners previous certificate is within 3 months prior of the course enrolment date then the date of the new certificate should correspond with the expiry date of the existing/previous certificate unless stated otherwise by the Duty Holder or Asset Owner or Operator.

Product Summary

Product Structure:

To achieve the OPITO Banksman & Slinger Competence Assessment the learner will need to complete the 4 mandatory units

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Unit Code	Unit Title
OIS-244	Direct and Control the Movement and Placing of Loads (Practical)
OIS-243	Direct and Control the Movement and Placing of Loads (Theory)
OIS-285	Prepare and Sling Loads (Practical)
OIS-284	Prepare and Sling Loads (Theory)

Unit Summary

Unit Code	OIS-244
Title	Direct and Control the Movement and Placing of Loads (Practical)
Guided Learning Hours	See GLH at Product level
Assessment Guidance	<p>Centres must ensure that learners are assessed against the theoretical outcomes specified in each unit prior to any practical assessment taking place, where applicable. There will be instances where it is most appropriate to assess the learners knowledge and practical skills simultaneously.</p> <p>Learners will be assessed through observation undertaking practical exercises covering all the criteria specified.</p> <p>The learner, in the Banksman's role, will be required to perform all the lifts 1 to 5 specified below - to the criteria specified</p> <p>Lift Types:</p> <ol style="list-style-type: none"> 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 <p>Lifting Operations:</p> <p>The lifting operations must be either:</p> <p>(a) Taken from a bank of lifting exercises (complete with risk assessments and lifting plans) - prepared in advance by the Centre.</p> <p>Or</p> <p>(b) Planned workplace lifting operations (complete with risk assessments and lifting plans) that tests the learner against the Unit criteria specified in this section.</p> <p>Note: Risk assessments and lifting plans must be approved by a *competent person</p> <p>*Competent Person: A person nominated to approve risk assessments and lifting plans by virtue of relevant knowledge and expertise.</p> <p>During the assessment, the learner must take account of the relevant worksite operational requirements, procedures and safe working practices</p> <p>Learners must successfully complete all practical exercises in order to achieve the Unit.</p>

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	<p>Centres are required to complete, and learners to sign, the OPITO Banksman and Slinger Competence Assessment/ Reassessment Record in the supporting documents.</p> <p>Notes for the Assessor</p> <ol style="list-style-type: none"> 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 learner to complete each task – considering 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 OPITO Banksman and Slinger Competence Assessment/ Reassessment Record) by the OPITO-approved Centre. <p>Notification of Assessment Outcome</p> <p>Where a learner 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 requirements. The Assessment Centre must provide the learner and the learner's employer with a written report identifying why the learner was unsuccessful and suggest any further training requirement – within 7 days of the assessment.</p> <p>Centres are required to complete, and learners to sign, the OPITO Banksman and Slinger Competence Assessment/ Reassessment Record in the supporting documents.</p>
Assessment/Evidence Requirements	Records of assessment referencing all outcomes, must be securely maintained.

OUTCOMES	CRITERIA
<p>1 Outcome: Directing and Controlling the Movement and Placing of Loads</p> <p>The learner will perform:</p>	<p>1.1 Implementing the load-moving procedures effectively from the competent person's lifting plan and risk assessment</p> <p>1.2 Discussing the lift with relevant personnel at a team briefing (TBT)</p> <p>1.3 An understanding of the procedure to follow in the event of a general platform alarm</p> <p>1.4 An understanding of the company procedure for environmental conditions and the limits allowed</p> <p>1.5 Confirming the weight of the load</p> <p>1.6 Confirming signaling and communication methods with relevant personnel</p>

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	<p>1.7 Awareness of permanent obstructions within the crane reach and working area</p> <p>1.8 Installing barriers effectively to keep the lifting area clear</p> <p>1.9 Checking the load rating and size of the lay down area</p> <p>1.10 Checking that the pickup and lay down areas have effective exits, unobstructed access and escape routes</p> <p>1.11 Visually checking the load and the lifting equipment</p> <p>1.12 Ensuring the slinger has the correct lifting accessories for the load and pre-use checks have been carried out</p> <p>1.13 Ensuring that personnel are in safe positions</p> <p>1.14 Establishing and maintaining effective co-operation and communications with the crane operator, slingers, and for supply boat operations the deck crew on the supply vessel</p> <p>1.15 Giving the signal to lift, minimally at first, to test stability</p> <p>1.16 Accurately directing the load to its destination, using agreed communications</p> <p>1.17 Maintaining an awareness of ongoing or adjacent activities that may affect crane operations</p> <p>1.18 Monitoring the support and balance of the slung load during travel</p> <p>1.19 Positioning and giving the signal for the crane operator to set down the load and relax the sling(s)</p> <p>1.20 Effectively handing over the lift to the load handlers/slingers for them to remove the lifting equipment.</p>
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Unit Code	OIS-243
Title	Direct and Control the Movement and Placing of Loads (Theory)
Guided Learning Hours	See GLH at Product level
Assessment Guidance	<p>Learners will be required to undertake a written or electronic knowledge assessment test which covers the outcomes and corresponding criteria stated. Each of the criteria must be covered. The knowledge assessment must be of a 'closed book' format, questions must be clearly referenced against specific criteria and question selection must be random.</p> <p>The knowledge test must incorporate written and/or scenario-based questions and multiple-choice questions. A maximum of 50% of questions should be multiple choice. Learners must achieve a pass mark of 80% or higher of the criteria to successfully complete the knowledge assessment.</p>
Assessment/Evidence Requirements	Records of assessment referencing all outcomes, must be securely maintained.

OUTCOMES	CRITERIA
<p>1 Outcome: Directing and Controlling the Movement and Placing of Loads</p> <p>The learner will understand:</p>	<p>1.1 The Banksman's responsibilities under the Health and Safety Statutory requirements</p> <p>1.2 The approved procedures and practices in the context of the operations, the work activity and the workplace</p> <p>1.3 How to interpret instructions for the movement of loads</p> <p>1.4 How to establish the weight of loads</p> <p>1.5 The relevant personnel involved in the activity and reporting lines and procedures</p> <p>1.6 Unsafe areas to stand near the load</p> <p>1.7 The methods used for signalling and communication</p> <p>1.8 The emergency stop signal that can be given by anyone to the crane operator</p> <p>1.9 Route planning methods and techniques</p>

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	<p>1.10 The reasons for wearing high-visibility clothing</p> <p>1.11 Why it is important that the hook is above the load's centre of gravity</p> <p>1.12 The additional considerations required for following non-standard lifts such as heavy lifts, long loads and blind lifts</p> <p>1.13 The necessary considerations for working with cranes in adverse weather conditions</p> <p>1.14 Areas of the site/ installation which need special consideration if a load needs to be landed near or passed close to those areas</p>
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Unit Code	OIS-285
Title	Prepare and Sling Loads (Practical)
Guided Learning Hours	See GLH at Product level
Assessment Guidance	<p>Centres must ensure that learners are assessed against the theoretical outcomes specified in each unit prior to any practical assessment taking place, where applicable. There will be instances where it is most appropriate to assess the learners knowledge and practical skills simultaneously.</p> <p>Learners will be assessed through observation undertaking practical exercises covering all the criteria specified.</p> <p>The learner, in the Slinger's role, will be required to perform all slung load types 1 to 4 specified below- to the criteria specified.</p> <p>Types of Slung loads:</p> <ol style="list-style-type: none"> 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 4. Prepare and sling a load using manmade fibre slings <p>Lifting Operations:</p> <p>The lifting operations must be either:</p> <p>(a) Taken from a bank of lifting exercises (complete with risk assessments and lifting plans) - prepared in advance by the Centre.</p> <p>Or</p> <p>(b) Planned workplace lifting operations (complete with risk assessments and lifting plans) that tests the learner against the Unit criteria specified in this section.</p>

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	<p>Note: Risk assessments and lifting plans must be approved by a *competent person</p> <p>*Competent Person: A person nominated to approve risk assessments and lifting plans by virtue of relevant knowledge and expertise.</p> <p>During the assessment, the learner must take account of the relevant worksite operational requirements, procedures and safe working practices</p> <p>Learners must successfully complete all practical exercises in order to achieve the Unit.</p> <p>Centres are required to complete, and learners to sign, the OPITO Banksman and Slinger Competence Assessment/ Reassessment Record in the supporting documents.</p> <p>Notes for the Assessor</p> <ol style="list-style-type: none"> 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 learner to complete each task – considering 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 OPITO Banksman and Slinger Competence Assessment/ Reassessment Record) by the OPITO-approved Centre. <p>Notification of Assessment Outcome</p> <p>Where a learner 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 requirements. The Assessment Centre must provide the learner and the learner's employer with a written report identifying why the learner was unsuccessful and suggest any further training requirement – within 7 days of the assessment.</p> <p>Centres are required to complete, and learners to sign, the OPITO Banksman and Slinger Competence Assessment/ Reassessment Record in the supporting documents.</p>
Assessment/Evidence Requirements	Records of assessment referencing all outcomes, must be securely maintained.

OUTCOMES	CRITERIA
<p>1 Outcome: Preparation and Slinging of Loads</p> <p>The learner will perform:</p>	<p>1.1 Discuss the lifting plan and the risk assessment relevant to the lifting operation/s at the TBT with all the personnel involved in the task</p> <p>1.2 Using relevant information and instructions to accurately identify the weight of the load to be moved</p>

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	<p>1.3 Choosing the slinging technique appropriate to the characteristics of the load and the intended lift</p> <p>1.4 Checking the condition of the load so that it is fit to be lifted</p> <p>1.5 Checking for potential dropped objects on the load</p> <p>1.6 Checking that the load is free to be moved</p> <p>1.7 Selecting lifting accessories and confirm that they are suitable for the load</p> <p>1.8 Conducting pre-use checks of the lifting accessories</p> <p>1.9 Securing the cargo within a container/half height using ratchet straps</p> <p>1.10 Preparing and slinging loads appropriate to the slinging technique chosen</p> <p>1.11 Attaching tag lines to the load and use of handsfree lifting tools* (if required)</p> <p>*The use of handsfree lifting tools may be subject to region or company specific operational practices. Where learners have not been previously trained in the use of such tools or are not required to use them on the worksite, their use may be excluded from the assessment.</p> <p>1.12 Effectively handing over the load to the Banksman when the load is ready to be lifted</p> <p>1.13 Keeping hold of the tag lines and using handsfree lifting tools* during the lift under direction from the Banksman - if tag lines and/or handsfree lifting tools have been used</p> <p>*The use of handsfree lifting tools may be subject to region or company specific operational</p>
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	<p>practices. Where learners have not been previously trained in the use of such tools or are not required to use them on the worksite, their use may be excluded from the assessment.</p> <p>1.14 Approaching the load in its destination when signaled by the Banksman</p> <p>1.15 Releasing the load and carry out post-use checks</p> <p>1.16 Storing the lifting accessories</p> <p>1.17 Disposing of wastes in accordance with site/installation procedures</p>
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Unit Code	OIS-284
Title	Prepare and Sling Loads (Theory)
Guided Learning Hours	See GLH at Product level
Assessment Guidance	<p>Learners will be required to undertake a written or electronic knowledge assessment test which covers the outcomes and corresponding criteria stated. Each of the criteria must be covered. The knowledge assessment must be of a 'closed book' format, questions must be clearly referenced against specific criteria and question selection must be random.</p> <p>The knowledge test must incorporate written and/or scenario-based questions and multiple-choice questions. A maximum of 50% of questions should be multiple choice. Learners must achieve a pass mark of 80% or higher of the criteria to successfully complete the knowledge assessment.</p>
Assessment/Evidence Requirements	Records of assessment referencing all outcomes, must be securely maintained.

OUTCOMES	CRITERIA
<p>1 Outcome: Preparation and Slings of Loads</p> <p>The learner will understand:</p>	<p>1.1 The Slinger's responsibilities under the Health and Safety Statutory requirements</p> <p>1.2 The approved procedures and practices in the context of the operations, the work activity and the workplace</p>

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	1.3	How to interpret instructions for the movement of loads
	1.4	How to establish the weight of loads
	1.5	The relevant personnel involved in the activity and reporting lines and procedures
	1.6	Unsafe areas to stand near the lifting operation
	1.7	The colour coding and marking systems for lifting equipment and accessories, and why they are used
	1.8	SWL, WLL and sling angles
	1.9	Considerations to ensure load stability, security and correct weight distribution
	1.10	How information on the load characteristics (e.g. hazardous and non-hazardous) should be communicated
	1.11	How to use lifting accessories within their capabilities
	1.12	The types of faults that are possible with lifting accessories
	1.13	How to secure the cargo within container/half height using ratchet straps
	1.14	How to handover effectively during lifting operations
	1.15	That the emergency stop signal can be given by anyone to the crane operator
	1.16	How to check slings after use
	1.17	How to coil and store reusable slings after use
	1.18	How to check crane pennants and the hooks

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	<p>1.19 The reporting structure for identifying unusable lifting equipment and materials</p> <p>1.20 The purpose of a rigging loft and quarantine</p> <p>1.21 How to correctly store various types of lifting equipment and accessories</p> <p>1.22 Appropriate locations and environmentally sound techniques for disposing of waste materials</p>
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ABOUT OPITO

OPITO is the global, not-for-profit, skills body for the energy industry. For over three decades the company has ensured safety is at the forefront of operations, with more than 375,000 people trained every year.

Links

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