

openreach

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For all Partners working in the Openreach network

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Licensing, Quality Management & Accreditation for Partners Working in the Openreach Network

About this document ...

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| Issue 3 | 05-Feb-2020 | Quality Standards & Accreditation Network Engineering | Attachment removed, body of attachment now in main doc. Changes to wording in accreditation note 5. Note 9, LA re-accreditation process updated. Courses RC1 & BTSEC made mandatory |
| Issue 2 | 21-Aug-2019 | Marc Henson | The attached document has been updated to v7. |
| Issue 1 | 02-Apr-2019 | Keith Allen | New document |

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1 *Introduction*

This document defines the process for the Licensing & Accreditation of all personnel working on Openreach contracts. This is to enable operatives to work in the Openreach network in a safe and effective manner and deliver products that are compliant with the current contract conditions for Openreach and its customers.

The process provides an effective, workable Accreditation Scheme that meets Openreach's requirements and the requirements of BS EN ISO9001:2015.

Each Partner shall ensure that a robust system is developed, documented, and maintained within their organisations and that they allocate adequate resources to ensure that full compliance with the scheme is achieved.

2 *Definitions*

- **Administration staff:** Office based personnel who perform activities associated with the progression of the Openreach order, the administration of work or the licensing database and their associated tasks
- **Assessor:** Defined as someone accredited by a Lead assessor
- **Auditor/Inspector:** Any person responsible for checking the quality and compliance of work completed, this may include, but is not limited to auditors, supervisors, and managerial staff.
- **Auxiliary Field Operative:** Any person employed directly or indirectly by the partner in the field not working in or on the Openreach network on related contracts. Not included in this definition are Inspectors, Auditors, Quality checkers, Supervisors, Surveyors, and all Managerial and administration staff.
- **Competent Person:** Quality Inspector, Assessor, or other suitable person (e.g. by qualification, experience or ability as agreed by a Senior Manager of the partner.)
- **Critical Defect:** Items attracting a 10-point score on a quality check sheet or defined as critical by a competent person.
- **Digital Evidence:** Photographic or digital recordings taken at key points of any task being completed.
- **Fully supervised:** An operative who is monitored on site at all times by a person accredited in the relevant modules.
- **Lead Assessor:** A lead assessor is defined as someone who has been successfully accredited by the Openreach Accreditation and Quality standards team in the specific module. This Lead Assessor may then accredit Assessors, following this both Lead Assessors and Assessors can accredit

operatives. Assessors cannot accredit other Assessors on Non-Civils or Civils modules.

- **Major Defects:** Items attracting a 5-point score on a quality check sheet.
- **Minor Defects:** Items attracting a 1 or 0 point score on a quality check sheet.
- **Observed defects:** Any defect found attributable to the operative concerned, but not appropriate to the inspection/audit being conducted.
- **Openreach Accreditation:** This is a demonstration of competence in one or more skills to Openreach standards on a modular format. This allows an operative to work unsupervised on the Openreach Network covered in those modules and includes both civils and non-civils work streams.
- **Openreach License:** 9-digit numeric ID registration (Person Number (PN) old UIN) used to identify individuals employed on an Openreach contract.
- **Operative:** Any person employed directly or indirectly by the partner working in/on the Openreach network.
- **Specialist contractor:** Any person/company employed directly or indirectly by the partner to perform a task using specialist skills not normally performed by the partner but for which the partner has tendered a specific rate or the task is included in the normal tendered rate(s). Examples include but are not limited to Specialist traffic management, Gully sucking, De-silting teams and tree surgeons.
- **Supervisor:** The person responsible for job progression and the management of operatives in the field.
- **Surveyor:** A person who completes surveys.
- **Tier 1 Partner:** A partner who has an agreed contract with Openreach and has access to all contractual, quality and accreditation documents held on **CANDID** website.
- **Tier 2 Supplier:** A supplier who is employed by a Tier 1 partner but does not have an agreed contract with Openreach nor access to the **CANDID** website.

3 ***Training and Accreditation***

To work unsupervised in the Openreach network all Operatives must be:

- Suitably trained in all aspects of the work they are performing.
- Accredited in the appropriate modules for personal safety and the safety of 3rd parties.
- Hold **all** mandatory accreditations for the job role(s) they perform as defined in the Skills Matrix (section 11.6).
- Hold any additional accreditations pertinent to the task/role being completed, examples of these can be found in the Skills Matrix (section 11.6). It will be

the partner's responsibility to manage any additional accreditation requirements.

- Accreditation modules can be found in the ISIS Bookstore and on the **CANDID** website.
- Operative and Assessor accreditations must be fully documented, and evidence of competency must be available for audit if required.
- Partners must also ensure that all relevant legislative/ H&S licensing/accreditation requirements are complied with i.e. NRSWA, CSCS/EUSR etc.
- All partner Operatives, Assessors and Lead Assessors working on the Openreach network must be registered on the Network Operative Passport Scheme (NOPS) run by Smart Awards. All accreditations must be recorded on the NOPS card and all operatives must be able to show their card on site when requested.

Note: It may be the case that occasionally accreditation modules are yet to be developed. Where this is the case, operatives will not be allowed to work in the network unsupervised until suitable training has been given. The partner will accredit the individuals concerned when outstanding modules become available. Where an accreditation module is not yet available, quality checks will still be carried out in accordance with Note 8 in this document.

The basic skills which the Openreach accreditation process covers are:

- **Civils**
- **Non-Civils (Safety and Craft)**
- **Auditor/Inspector**
- **Surveyor**
- **Supervisor**

In addition:

Auxiliary Field Operative (AFO) - Examples of AFOs include store delivery and grab wagon drivers whose only function whilst on site is to either deliver or remove stores and materials. Such staff must be fully trained for their task and meet all relevant NRSWA, Health & Safety, COSHH, legal and contractual requirements.

AFOs will not require any Openreach accreditation to perform their duties unless they also perform work in the network covered by existing accreditation modules. Where this is the case, the appropriate accreditation must be held. (E.g. where a grab driver also performs tasks covered by the General Operative 1 accreditation module)

Specialist Contractors - All specialist contractors must be fully trained for their task, hold suitable recognised outside qualifications/accreditation where

available/applicable and meet all relevant NRSWA, Health & Safety, COSHH, legal and contractual requirements.

4 **Standards**

The standards are based on current operational instructions including:

- The Contract regardless of type, e.g. not just ONSA.
- Quality standards and associated FPQ scoresheets issued by the Quality Standards and Accreditation team.
- Openreach specifications e.g. LN550 and associated CN drawings.
- Contractor method statements and craft manuals.
- Legislation e.g. NRSWA, Health and Safety regulations & CDM.
- Codes of Practice e.g. HAUC and NJUG.
- EPT/ANS/Axxx series of ISIS documents.
- Other officially available ISIS documents.
- Tree cutting and forestry work – The Supplier shall ensure that they and their Subcontractors are at all times, full members of the **Arboriculture Association Approved Contractor Scheme (AACS)**
- Scaffold – The Suppliers organisation must be signed up to the '**National Access Scaffolding Confederation (NASC)**'

Other documentation officially distributed by Openreach e.g. Access Engineering Communications. (AEC)

- When working on a site managed by a 3rd party, the partner must comply with the Site Manager's Health and Safety Requirements, specifically (but not exclusively) and as directed by the Site Manager:
 - EUSR / CSCS Cards for all operatives that work on a 3rd party site.
 - LOLER certificates for all lifting equipment.
 - Site Specific Method Statements and associated Task Statements. (Including Risk assessments)
 - Personal Protection Equipment. (PPE)
 - Confined Spaces qualification.
 - Construction Design and Management. (CDM)

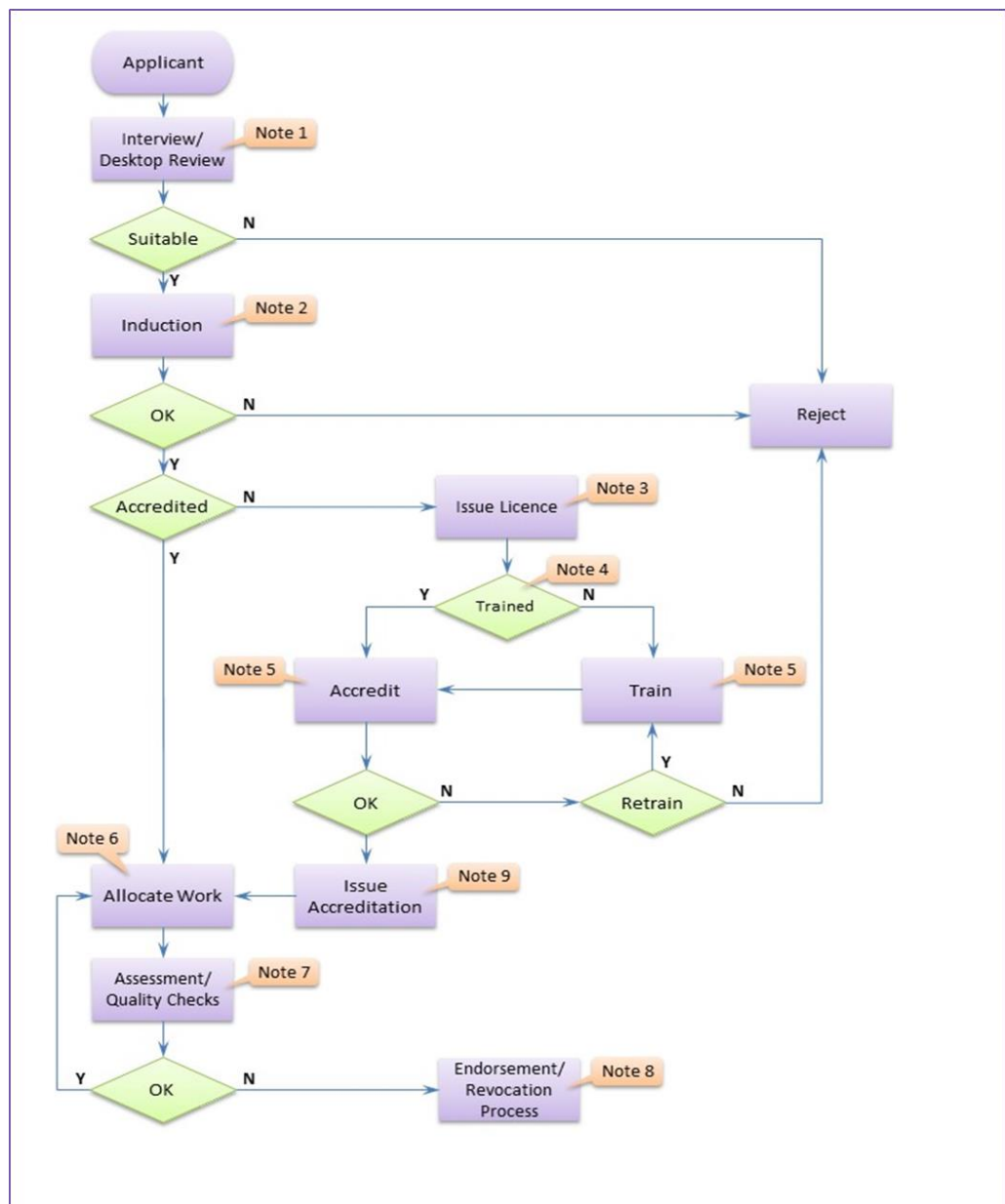
Partners should ensure that their internal quality checks reflect the documented standards and cover the full scope of the Openreach quality score sheets.

Note: Where conflicts occur refer to the contract for order of precedence.

5 *Quality audit and Management System*

All partners will have their own Quality and Audit Management System. This should include 'in progress' and 'retrospective' quality checks including recording the In-Progress and Retrospective checks via the digital evidence process. The partners must keep records of performance and be able to demonstrate an effective internal quality and action process aligned to ISO9001 (2015) section 4.2. The partner must keep, manage, and action an effective endorsement and revocation process. Openreach may review the Digital Evidence as per the Digital Evidence process reference ONSA contract and failure to comply will lead to an administration charge.

6 Overall Process Flowchart



Note: The following notes should be read in conjunction with the above flow chart.

7 *Pre-Employment Assessment – Note 1*

The partner will only employ suitable competent people or individuals that have the potential to meet the Openreach requirements with subsequent training and accreditation. The partner will ensure all Third-party pre-employment checks have been completed as defined in the partner on-boarding policy.

The partner will request an Openreach Person Number from the Contractor Compliance Team. contract.compliance@Openreach.co.uk (see **Note 3**)

Prior to an individual commencing work on the Openreach Network the partner will formally assess the operative's knowledge and capability of working on the Openreach Network by:

- Providing evidence of any applicable training undertaken and qualifications already obtained.
- Providing evidence of previous work experience.
- Providing references from previous employers.
- Providing evidence that the individual demonstrates a positive attitude towards quality, safety, customer care and the environment.

8 *Induction – Note 2*

The safety of the general public and the partner's employees/operatives cannot be compromised; therefore, it is mandatory that every operative who works on or in the Openreach network undergo induction training whether they have previous experience or not. MT003 is Mandatory before any works start.

The minimum topics to be covered are:

- Health and Safety.
- Environment.
- Quality.
- Customer care.
- Applicable Openreach and company processes.
- Mandatory training
 - MT003

Operatives who do not display suitable aptitude to meet the Openreach requirements during the induction should not be allowed to work on the Openreach network.

MT003 has superseded RC1 and BTSEC003 for field engineers.

9 **Openreach ID Number – Note 3**

All individuals who work on/in the Openreach network will require an Openreach Person number. Where the person already has an Openreach person number it may be possible in some cases to establish certain details relating to previous endorsement /revocation history, although this will be governed by the General Data Protection Regulations (GDPR) of 2018. Openreach are only permitted to supply certain information once the operative is employed by the Tier 1 partner and working on the Openreach network.

9.1 **Production**

This includes operatives, inspectors, supervisors, and surveyors.

An Openreach Person number must be obtained for all new production people by the partner once the operative has attended their induction course as defined in **Note 2** above and the partner intends continuing their employment on an Openreach contract.

All production people shall have a probationary period to work towards and obtain any identified accreditation needed as defined in **Note 5** below.

A non-accredited production person may only work on the Openreach network providing that:

- They are fully supervised for a maximum period of 16 weeks by a person who holds the relevant accreditations for the task being completed. The safety accreditations must be the full practical versions not appreciation modules.
- The accredited supervising person and trainee are liable to any recourse for any defect attributable to the trainee.

9.2 **Support Staff**

Examples of support people requiring an Openreach Person number for the administration and operation of the contract include but are not limited to:

- Quality managers.
- Admin staff and admin managers who are involved in work management.
- The partner's Area Contract managers and their reporting managers. (Excludes supervisors).

There may be other personnel within the partner organisation who will require an Openreach Person number to access the **CANDID** website on a read only basis without being directly involved in work management.

Where appropriate, training and the applicable associated accreditation should be undertaken. Support staff will not be expected to be formally endorsed in the same manner as production staff, but the partner will take appropriate action to address any failings where they are found to be responsible.

The Supplier shall ensure that all their office Staff working on behalf of Openreach are recorded on the Openreach Contract Compliance Database.

All partners providing an engineering service on behalf of Openreach but not working on the network e.g. auxiliary services (traffic management operatives), will need to be recorded on the Openreach Contract Compliance Database.

10 *Assessment of Training Need – Note 4*

The partner will assess each person's training requirements to meet the accreditation standards.

The assessment can be by interview, a formalised skill test, a monitor of performance or a combination of these elements.

Training can be formal, on the job, or coaching session(s) dependent on the individual's aptitude, established experience and skill level.

11 *Accreditation – Note 5*

All individuals working on the Openreach network must be appropriately accredited for the work they undertake. A guide to the Non civils (Craft) and Civils accreditations for each job role can be found in the Skills and Accreditation Matrix.

New recruits may work unaccredited in the Openreach network for up to 16 weeks, during this period they must be supervised by a fully accredited person. The formal accreditation should normally take place within this period.

Individuals who fail to meet the required standard may, at the discretion of the partner, be allowed a further four weeks to achieve the required standards before the accreditation takes place. Examples of this would include pre-arranged periods of leave, sick absences in excess of 2 weeks during the 16-week period or not making sufficient progress to achieve accreditation. The circumstances must be recorded in the individuals training record, including a copy of the initial accreditation results and all subsequent assessments where this was the reason for extending the trial period.

When the individual is ready for assessment, the appropriate **Civils** or **Non-Civils** process as defined below must be followed:

Only a qualified lead assessor or assessor, accredited to assess operatives in the specific module(s) concerned, is permitted to carry out an accreditation.

Partners can use an approved and accredited training provider to deliver their accreditations or they can deliver these themselves. The Openreach Accreditation and Quality Standards team can accredit Lead Assessors for each craft or civils module to directly contracted (Tier1) partners. The team will also provide support and sign off of training/assessment sites operated by the Tier 1 partner against the relevant module. If changes are made to the site or a new site is created then the Openreach Quality and Accreditation team will need to sign off the site before it can be used. Openreach will not accredit Lead Assessors in sub-contractor organisations where a direct contractual relationship with Openreach does not exist. A Tier 1 partner that has a Lead Assessor can accredit Assessors in a sub-contractor organisation subject to the necessary due diligence on safety, quality and delivery being conducted. For any assessors created, it is the Lead Assessors responsibility to sign off their site, ensuring it meets the minimum requirements to deliver the module.

Lead Assessor/Assessor status does not give the ability to offer the accreditation to industry. It should be used to accredit operatives from their company or sub-contractors working for that company.

Anyone that wishes to deliver Openreach accreditations as a approved accreditation provider, will need to go through the Openreach onboarding process, which can be found in AEI/ACC/Z004.

Lead Assessor and Assessor Status is not transferable between different companies. If the Lead Assessor/Assessor leaves a Tier 1 partner, Sub contractor or training provider then their status will revert to Operative. Tier 1 Partners and training providers should contact Smart Awards to advise them that the Lead Assessor/Assessor status needs to be removed. For Lead Assessors, they should also notify the Openreach accreditation team.

Operatives who fail to achieve accreditation must not perform work on the Openreach network that is covered in the failed accreditation module(s). The partner may then retrain the operative at their discretion and complete re-accreditation.

Accreditation Processes are:

11.1 Civils modules

The partner should assess the operative on their first job in the Openreach network. This assessment should be recorded following the digital evidence requirements and provided to Openreach on request.

For successful Candidates, two further quality checks should be carried out, one 'In Progress' and one 'Retrospective' on activities covering the recently successful modules within the first four weeks of unsupervised working. The two further assessments In-Progress and Retrospective will be recorded

following the digital evidence requirements and provided to Openreach on request.

Partners will keep full records of accreditation and quality checks completed, also digital evidence and will be provided to Openreach on request.

The full digital evidence requirements are held on CANDID, the summary of requirements is list below.

If the specification detailed below is not met, further evidence may be requested, providing clear evidence will demonstrate Openreach Quality Standards and statutory obligations are being met.

Digital evidence may be audited by Openreach to ensure compliance with the accreditation process.

Summary of requirements

To enable desktop assessment of images they must clearly identify the physical location where they were taken. Ideally this should be via GPS reference (Geotagged) including time/date. However, where this is not possible then the images must contain enough detail to identify them to a location. Where possible a single image should be used to capture multiple technical requirements providing the image is of sufficient resolution.

- Digital evidence shall cover the key work stages and capture specific technical details.
- Before work commences.
- Site is set up safely – compliant with Street works Code of Practice.
- Any onsite problems/issues encountered as work progresses. (E.g. to substantiate a DFE/TDFS if required)
- Clearly labelled.
- Completed work.
- Closed down and cleared work area.

11.2 Non-Civils (Craft) modules

The operative will normally be assessed in a training environment away from the Openreach network.

For successful Candidates, two further quality checks will be carried out, one 'In Progress' and one 'Retrospective' on activities covering the recently successful modules within the first four weeks of unsupervised working. The two further assessments In-Progress and Retrospective will be recorded following the digital evidence requirements and provided to Openreach on request. Ref 11.1

11.3 Supervisors/Inspectors

Supervisors/Inspectors should be accredited in line with any relevant Supervisor accreditation module.

11.4 Surveyors

Surveyors should be accredited in line with the relevant Surveyor accreditation module(s). The accreditation requirements for surveyor job roles can be found in the Skills Matrix.

Warning: Partners must keep full records of all accreditations and quality checks they have completed.

11.5 Quality Checks

Operatives who leave/attract any major or critical defects during any of the above checks will be deemed to have failed and have their license revoked for the skill set(s) concerned.

11.6 Skills and Accreditation matrix

Fibre & MDU

| Task/Job Role | Mandatory Security & Regulatory Compliance | Mandatory Safety Accreditations | Mandatory Craft Accreditations | Mandatory NRSWA Streetworks Qualifications | Optional Accreditations |
|-----------------------------------|--|---|--------------------------------|--|--------------------------------|
| Spine Survey | MT003 | SA002/SA006 & SA001/SA001a/SA009 | S013 & S018 | SWQR certificate O1 | SA051c/equivalent, K008, SA005 |
| Heavy Cabling UG | MT003 | SA002 /SA006 | K008 & K006 | SWQR certificate O1 | SA003, K009, SA005 |
| Overblow | MT003 | SA002/SA006 | N033 | SWQR certificate O1 | |
| Fibre Jointing (Ladder) | MT003 | SA051c/equivalent & SA001/SA009 & SA002/SA006 | N023 | SWQR certificate O1 | K008, N020, SA005, A12 |
| Fibre Jointing (MEWP) | MT003 | IPAF 1b/equivalent & SA001a/SA001/SA009 & SA002/SA006 | N023 | SWQR certificate O1 | K008, N020, SA005, A12 |
| Fibre Light Loss Testing (Ladder) | MT003 | SA051c/equivalent & SA001/SA009 & SA002/SA006 | N039 | SWQR certificate O1 | |
| Fibre Light Loss | MT003 | IPAF 1b/equivalent & | N039 | SWQR | |

| | | | | | |
|--|-------|---|-------------|---------------------|---|
| Testing (MEWP) | | SA001a/SA001/SA009 & SA002/SA006 | | certificate O1 | |
| Fibre Jointing - UG only | MT003 | SA002/SA006 | N026/N023 | SWQR certificate O1 | K008, N020, SA005 |
| Ribbon Fibre Jointing | MT003 | SA002/SA006 | N034 | SWQR certificate O1 | SA005 |
| OFN Fibre Cabling - UG | MT003 | SA002/SA006 | K008 & N028 | SWQR certificate O1 | SA003, SA005 |
| OFN Fibre Cabling - OH (Ladder) | MT003 | SA051c/equivalent & SA001 or SA009 | N027 | SWQR certificate O1 | J005, SA008, SA005, SA024, A12 |
| OFN Fibre Cabling - OH (MEWP) | MT003 | IPAF 1b/equivalent & SA001a/SA001 or SA009 | N027 | SWQR certificate O1 | J005, SA008, SA005, SA024, A12 |
| Rod and Rope | MT003 | SA002/SA006 | K008 | SWQR certificate O1 | SA003, SA005 |
| FTTP Access Survey | MT003 | SA002/SA006 & SA001/SA001a/SA009 | S011 & S013 | SWQR certificate O1 | SA051c/equivalent, K008, SA005, A12, S017 |
| FTTP Quality Checks | MT003 | SA002/SA006 & SA001/SA001a/SA009 | M023 & M039 | SWQR certificate O1 | SA051c/equivalent, M022, M006, SA005, A12 |
| MDU Survey | MT003 | SA002/SA006 & SA020/A16/SA020a & SA007/ equivalent | S012 & S013 | SWQR certificate O1 | K008, SA005 |
| MDU Quality Checks | MT003 | SA002/SA006 & SA007/ equivalent | M029 | SWQR certificate O1 | SA005 |
| MDU L2C | MT003 | SA020/A16 & SA007/equivalent | N030 | | SA051c/equivalent |
| Internal MDU Build | MT003 | SA020/A16 & SA007/equivalent | N029 | | SA005 |
| FTTP L2C Home Install | MT003 | SA020/A16 | N038 | | SA051c/equivalent |
| FTTP L2C step 1 (Ladder) | MT003 | SA002/SA006 & SA051c/equivalent & SA001/SA009 | N22 | SWQR certificate O1 | K008, N10, SA005, A12 |
| FTTP L2C step 1 (MEWP) | MT003 | SA002/SA006 & IPAF 1b/equivalent & SA001a/SA001/SA009 | N22 | SWQR certificate O1 | K008, N10, SA005, A12 |
| FTTP L2C Step 2 | MT003 | SA020/A16 | N037 | | SA051c/equivalent |
| Optical Test Head Installation - Viavi | MT003 | SA020/A16 | N036 | | |
| Optical Test Head | MT003 | SA020/A16 | N041 | | |

| | | | | | |
|---------------------|-------|-------------------------------|-------------------------------|-----------------------------|-------------------------------|
| Installation - Exfo | | | | | |
| PTO | MT003 | SA002 | N011 & N035 | SWQR certificate O1 | N039 |
| Supervisor | MT003 | AS Above for each Job Role | AS Above for each Job Role | SWQR Card certificate S1 | AS Above for each Job Role |

Poling & Overhead

| Task/Job Role | Mandatory Security & Regulatory Compliance | Mandatory Safety Accreditations | Mandatory Craft Accreditations | Mandatory NRSWA Streetworks Qualifications | Optional Accreditations |
|--|---|---|--|---|--|
| Poling - PEU Operative | MT003 | SA001a/SA001/SA009 & SA002/SA006 & SA021/A14/equivalent | O002 & O003 & O004 & O005 & O006 | SWQR certificate LA, O1, O2, O3 | SA023/Equivalent, SA051c/ equivalent, O008, SA005, A12 |
| Poling - Overhead Copper (Ladder) | MT003 | SA051c/equivalent & SA001/SA009 | E001 & F020 | SWQR certificate O1 | SA023/Equivalent, K003, K004, O008, SA008, SA005, SA024, A12 |
| Poling - Overhead Copper (MEWP) | MT003 | IPAF 1b/equivalent & SA001a/SA001/SA009 | E001 & F020 | SWQR certificate O1 | SA023/Equivalent, K003, K004, O008, SA008, SA005, SA024, A12 |
| Poling - Overhead Fibre (Ladder) | MT003 | SA051c/equivalent & SA001/SA009 | N042 | SWQR certificate O1 | SA023/Equivalent, O008, SA008, SA005, SA024, A12 |
| Poling - Overhead Fibre (MEWP) | MT003 | IPAF 1b/equivalent & SA001a/SA001/SA009 | N042 | SWQR certificate O1 | SA023/Equivalent, O008, SA008, SA005, SA024, A12 |
| MEWP Operator | MT003 | SA001a/SA001/SA009 & IPAF 1B/equivalent | | SWQR certificate O1 | SA051c/equivalent, 1a, 3a, 3b or equivalent, SA008, SA005, SA023, A12 |
| Manual poling (provision and recovery) | MT003 | SA001a/SA001/SA009 & SA002/SA006 | O009 | SWQR certificate LA, O1, O2, O3 | SA023/Equivalent, SA051c/equivalent, O008, SA005, A12 |
| Pole recovery | MT003 | SA001a/SA001/SA009 & SA002/SA006 & SA021/A14/equivalent | O005 | SWQR certificate LA, O1, O2, O3 | SA023/Equivalent, SA051c/equivalent, SA005, A12 |

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|-----------------------------------|-------|---|----------------------------|--------------------------|-------------------------------|
| Survey (AAP) | MT003 | SA002/SA006 & SA001/SA001a/SA009 | S013 & S017 | SWQR certificate O1 | SA051c/equivalent, SA005, A12 |
| Aerial cabling (Ladder) | MT003 | SA051c/equivalent & SA001/SA009 | K003 or K004 | SWQR certificate O1 | SA008, SA005, SA024, A12 |
| Aerial cabling (MEWP) | MT003 | IPAF 1b/equivalent & SA001a/SA001/SA009 | K003 or K004 | SWQR certificate O1 | SA008, SA005, SA024, A12 |
| Copper OH Cable recovery (Ladder) | MT003 | SA051c/equivalent & SA001/SA009 | F024 | SWQR certificate O1 | |
| Copper OH Cable recovery (MEWP) | MT003 | IPAF 1b/equivalent & SA001a/SA001/SA009 | F024 | SWQR certificate O1 | |
| Poling Labourer | MT003 | SA001/SA009 & SA002/SA006 | O003 | SWQR certificate O1 | |
| Supervisor | MT003 | AS Above for each Job Role | AS Above for each Job Role | SWQR Card certificate S1 | AS Above for each Job Role |

Civils

| Task/Job Role | Mandatory Security & Regulatory Compliance | Mandatory Safety Accreditations | Mandatory Craft Accreditations | Mandatory NRSWA Streetworks Qualifications | Optional Accreditations |
|--------------------------|--|---------------------------------|--|--|-------------------------------------|
| Blockages | MT003 | SA006/G01 | Q020(DB1) & K008 | SWQR certificate LA, O1, O2, O3 | |
| Chambers Modular | MT003 | SA006/G01 | Q013(BB1M) | SWQR certificate LA, O1, O2, O3 | Q035(SEC1) |
| Chambers Concrete | MT003 | SA006/G01 | Q012 (BB1C) | SWQR certificate LA, O1, O2, O3 | Q014(BB2C), Q015 (BB3C), Q035(SEC1) |
| Chambers Brick | MT003 | SA006/G01 | Q011(BB1B) | SWQR certificate LA, O1, O2, O3 | Q035(SEC1) |
| Manholes | MT003 | SA006/G01 | Q029(MH1) | SWQR certificate LA, O1, O2, O3 | |
| Duct Laying Basic | MT003 | SA006/G01 | Q021(DL1) & Q019(CD1) | SWQR certificate LA, O1, O2, O3 | Q036(SLEW1) |
| Duct Laying Intermediate | MT003 | SA006/G01 | Q021(DL1) & Q022(DL2) & Q019(CD1) | SWQR certificate LA, O1, O2, O3 | Q037(SLEW2) |
| Duct Laying Advanced | MT003 | SA006/G01 | Q021(DL1) & Q022(DL2) & Q023 (DL3) & Q019(CD1) | SWQR certificate LA, O1, O2, O3 | Q038(SLEW3) |

| | | | | | |
|--|-------|----------------------------|----------------------------|---|----------------------------------|
| Duct Slew | MT003 | SA006/G01 | Q036(SLEW1) & K008 | SWQR certificate LA, O1, O2, O3 | Q037(SLEW2) & Q038(SLEW3) |
| Mole ploughing | MT003 | SA006/G01 | Q030(MP1) | SWQR certificate LA, O1, O2, O3 | |
| Maintenance Excavation | MT003 | SA006/G01 | Q028(ME1) & K008 | SWQR certificate LA, O1, O2, O3 | |
| Reinstatement Operative - Footway | MT003 | SA006/G01 | | SWQR certificate LA, O1, O2, O3, O4, O5, O8 | certificate O6, O7 |
| Reinstatement Operative - Carriageway | MT003 | SA006/G01 | | SWQR certificate LA, O1, O2, O3, O4, O6, O7, O8 | certificate O5 |
| Frame and Cover footway | MT003 | SA006/G01 | Q025(FCFW1) | SWQR certificate LA, O1, O2, O3 | Q035(SEC1) |
| Frame and Cover Carriageway | MT003 | SA006/G01 | Q024 (FCCW1) | SWQR certificate LA, O1, O2, O3 | Q035(SEC1) |
| Street Cabinets | MT003 | SA006/G01 | Q016(CB2) | SWQR certificate LA, O1, O2, O3 | SA018, Q017(CB3) Q018(CCC1) N025 |
| Desilting, Gully sucking or Manhole survey | MT003 | SA002/SA006 | | SWQR certificate O1 | |
| Narrow Trenching | MT003 | SA006 | Q039 | SWQR certificate LA, O1, O2, O3 | |
| Labourer | MT003 | SA006/G01 | | SWQR certificate O1 | |
| Supervisor | MT003 | AS Above for each Job Role | AS Above for each Job Role | certificate LA S1, S2, S3, S4, S5, S6, S7, S8 | AS Above for each Job Role |

Legacy Copper and Fibre

| Task/Job Role | Mandatory Security & Regulatory Compliance | Mandatory Safety Accreditations | Mandatory Craft Accreditations | Mandatory NRSWA Streetworks Qualifications | Optional Accreditations |
|--------------------|--|---------------------------------|--------------------------------|--|--------------------------|
| FTTC | MT003 | SA002/SA006 | N003 & N005 | SWQR certificate O1 | N024, SA005 |
| FTTC Commissioning | MT003 | SA002/SA006 | N005 | SWQR certificate O1 | N024, SA005 |
| PCP Construction | MT003 | SA002/SA006 | F010 | SWQR certificate O1 | F016, F022, SA004, SA005 |

| | | | | | |
|---|-------|--|--|------------------------|--|
| Copper Frames | MT003 | SA020/A16 | H001 | | H004, SA005 |
| Fibre Frames - Must be accredited for correct frame type being worked on | MT003 | SA020/A16 | N031 (ODF) or N004 (OCR) or J010 (OFF/OFR) | | J008, SA005 |
| CAL/OMI (Ladder) | MT003 | SA051c/equivalent & SA001/SA009 & SA020/A16 | C004 & E001 & F005 | SWQR certificate O1 | F017, G005, N030, SA008, SA005, SA024, A12 |
| CAL/OMI (MEWP) | MT003 | IPAF 1b/equivalent & SA001a/SA001/SA009 & SA020/A16 | C004 & E001 & F005 | SWQR certificate O1 | F017, G005, N030, SA008, SA005, SA024, A12 |
| Copper jointing UG | MT003 | SA002/SA006 | F020 | SWQR certificate O1 | |
| Ethernet (Ladder) | MT003 | SA051c/equivalent & SA001/SA009 & SA002/SA006 & SA020/A16 | J009 or J011 or J012 | SWQR certificate O1 | SA005, A12 |
| Ethernet (MEWP) | MT003 | IPAF 1b/equivalent & SA001a/SA001/SA009 & SA002/SA006 & SA020/A16 | J009 or J011 or J012 | SWQR certificate O1 | SA005, A12 |
| FTTC MI (Ladder) | MT003 | SA051c/equivalent & SA001/SA009 & SA020/A16 | F005 & F017 | SWQR certificate O1 | N006, SA005, A12 |
| FTTC MI (MEWP) | MT003 | IPAF 1b/equivalent & SA001a/SA001/SA009 & SA020/A16 | F005 & F017 | SWQR certificate O1 | N006, SA005, A12 |
| FTTC SI | MT003 | | F005 & F017 | SWQR certificate O1 | |
| PCP Maintenance | MT003 | | | SWQR certificate O1 | G39 |
| Heavy cable recovery | MT003 | SA002/SA006 | K010 | SWQR certificate O1 | |

Supply and Install Inc Power

| Task/Job Role | Mandatory Security & Regulatory Compliance | Mandatory Safety Accreditations | Mandatory Craft Accreditations | Mandatory NRSWA Streetworks Qualifications | Optional Accreditations |
|---------------|---|------------------------------------|--------------------------------------|---|----------------------------|
| Supply and | MT003 | SA020/A16 | | | SA005, SA007 or |

| | | | | | |
|---|-------|----------------------------|---|---------------------------------|---|
| Install Engineer | | | | | UKATA |
| Supply and Install - fibre cable installation | MT003 | SA020/A16 | J008 | | SA005, SA007 or UKATA |
| Supply and Install - Mobile installation | MT003 | SA020/A16 | | SWQR certificate O1 | SA005, SA007 or equivalent, SA026 or equivalent |
| Ancillary Wiring or LLU Cabling | MT003 | SA020 & SA007/equivalent | | | SA051c/equivalent, SA026 |
| DSLAM Power Meter | MT003 | MOCOPA | | SWQR certificate O1 | |
| DSLAM - Power (RCD) | MT003 | Emergency first aid | C&G Part 1,2 & 3 or equivalent, latest edition BS7671, C&G 2391 | SWQR certificate O1 | |
| DSLAM Battery rotation | MT003 | Emergency first aid | Ace Telecoms Battery installation course & A350 Certificate | SWQR certificate O1 | SA005 |
| Conductive Concrete | MT003 | SA018 & SA006 | | SWQR certificate LA, O1, O2, O3 | |
| Equipotential Bonding | MT003 | SA002/SA006 | K008 | SWQR certificate O1 | |
| Supervisor | MT003 | AS Above for each Job Role | AS Above for each Job Role | SWQR Card certificate S1 | AS Above for each Job Role |

Skills Matrix Notes

- Supervisors not completing a practical activity (only supervising) can hold the appropriate SAxxxxa Safety appreciation module but will still require all mandatory accreditations relevant to the activity they are supervising. Supervisor compliance is managed by the partner.
- Module A8 and A9 should no longer be used and all reference to them will be removed from the skills matrix and compliance reporting on 31st Jan 2023.
- All other "A" modules were retired on 02/09/22 and should no longer be used. Any "A" modules attained up to this date will be honoured until they expire.
- Emergency first aid - Min 1 day practical

- Partners will need to ensure the correct SWQR Certificate for hot lay or cold lay is held.
- ACE - Alan Campbell engineering services ltd

Equivalent Accreditations & Qualifications

Openreach will accept Accreditations and qualifications which have been agreed to be an equivalent to those referenced in the skills matrix. The table below shows the list of agreed equivalent accreditations and qualifications.

| Equivalent Accreditations | NOPS Module No |
|--|--------------------------------|
| SA007 – Asbestos Awareness | |
| 1. UKATA Asbestos Awareness | UKATA |
| 2. ROSPA Asbestos Awareness | RoSPA 05 |
| 3. IATP Asbestos Awareness | IATP Asbestos Awareness |
| | |
| SA021 - Pole vehicle safety | |
| 1. ALLMI – Lorry Loader 3C, 3D or 3E | ALLMI 3c, ALLMI 3d or ALLMI 3e |
| 2. NPORs – N107 Lorry Loader | NPORS 19 |
| 3. CPCS – A36 Lorry Loader | CPCS 11, CPCS 12 or CPCS 13 |
| RTITB Vehicle-Mounted Hydraulic Lorry Loader | RTITB |
| ALLMI - Above 20tm using hook attachment | ALLMI 1d |
| ALLMI - above 20tm using auger attachment | ALLMI 7d |
| | |
| SA023 – Vehicle banksman | |
| 1. ALLMI Slinger/Signaller | ALLMI ss |
| 2. RTITB Commercial Vehicle Banksman | RTITB Banksman |
| 3. IPAF 1b | IPAF 1b |
| 4. NPORS N108 MEWP Boom | NPORS 22 |
| 5. CPCS A26A MEWP Boom - Vehicle mounted | CPCS 17 |
| | |

| | |
|---|--------------------------|
| SA026 - Safe working on flat roofs | |
| 1. SAGE Roof top access | SST RTA |
| | |
| SA051c - Tetra leaning ladder and flat roof | |
| 1.SA050c | SA050c |
| 2.Tetra | Q000050, Q000051 |
| 3. CSS | CSS-01 |
| 4. Ladder safety system | LSS-01 |
| | |
| IPAF 1B - Static Boom (MEWP) | |
| ITSSAR Static boom | ITSSAR 1B |
| NPORS N108 MEWP Boom | NPORS 22 |
| | |
| Emergency First Aid | |
| Emergency First Aid at Work | British Red Cross -FAW |
| Emergency First Aid at Work | St. Johns Ambulance EFAW |
| First Aid at Work | St. Johns Ambulance FAW |
| | |
| C&G 1,2,3 | |
| C&G 2365 level 2 & 3 | |
| C&G 236 part 1 & 2 | |
| C&G 2330 level 2 & 3 | |
| NVQ Level 3 Installing & Commissioning electrotechnical systems | |
| | |
| C&G 2391 | |
| C&G 2392 & 2394 | |

12 *Allocation of Work – All Work Streams – Note 6*

Work shall only be allocated to operatives who are currently accredited to carry out that work activity - see the notes section in **Accreditation** and **Training** above.

13 *On-going Assessment – All Work Streams – Note 7*

On-going assessment of skills is via 'in Progress quality checks - also see re-accreditation section in **Note 9** below.

14 *Endorsement / Revocation Process – Note 8*

Failures are to be identified from the Partners own internal process control procedures and quality management system, this should align with ISO9001 (2015), Sect 4.2. The following measures must be included:

- Openreach reported critical defects received via FPQ or CANDID that are accepted by the partner.
- Customer / 3rd Party complaints, which upon investigation are deemed to be attributable to a specific engineer / operative.
- NRSWA / Highway Authority defect notices.
- Critical / safety defects identified by the partners own inspection process.
- Compliance with post job completion photo recording checks, conducted by partner.
- Individual performance against any agreed SLA's or remedies within contracts:

Where failures have been observed there will be two levels of intervention, Endorsement and Revocation. The incident shall be investigated, and appropriate corrective action taken. Failure will normally lead to Endorsement. Serious failures will lead to Revocation.

14.1 Endorsement

Where partner quality checks or Openreach quality control identifies a Critical Defect, or there is another failure as identified above, an assessment and record will be made by the partner to establish the area of responsibility.

For Critical defects the License of the operative(s) deemed responsible for the failure will be endorsed against the item code concerned. An operative can only receive one endorsement per item code per estimate number / Job Number. This is to prevent multiple endorsements being raised for the same defect on a single estimate number /Job Number.

For other defects defined as critical by a competent person the failure will be endorsed against the failure description.

The endorsement will be classed as 'live' until the matter has been investigated including, where applicable, further quality checks have been completed and remedial action taken.

Remedial action may include interviews, toolbox talks, coaching and training. The endorsement can then be considered closed but will remain visible on the operative's record contained within Smart Awards where all endorsement and revocation details are stored.

Where the assessment identifies an operative was not at fault, the endorsement will be re-assigned to the appropriate person.

Endorsements will be applied within 5 working days from the identification of the operative responsible. This may only be exceeded in extenuating circumstances e.g. where the operative concerned is not contactable.

The operative shall be informed of the Endorsement and that it has been formally recorded.

The record should include the following information:

- Name and ID of offender(s).
- Name of Competent Person assigning the endorsement.
- Job No. / Location.
- Reason for Endorsement.
- Explanation of the procedures for endorsement and method of removal.
- Item code on which the endorsement is applicable.
- Corrective action proposed i.e. re-training, disciplinary action etc.
- Timescales for corrective action.
- Appeals procedure for operatives.

The partner shall assign, carry out any appeals and record details of the Endorsement on Smart Awards within a maximum of 21 calendar days of identification of the CD.

Each partner will instigate and record the corrective action, together with training given and timescales agreed. However, other shortfalls not directly contributed to by operative failure should be reviewed and corrective action identified. Corrective action should be completed within 60 days of the Endorsement details being recorded on Smart Awards.

The Endorsement details will still be entered where the partner no longer employs the operative or is no longer working on the Openreach network

| Defect Type | Defect Quantity | Recommended Action |
|--|-----------------|--------------------|
| Critical | 1 | Endorsement |
| Major Defects (Same Item Code) | 3 | Endorsement |
| Major Defects (all Item Codes) | 5 | Endorsement |

14.2 Revocation

Where a failure is identified from any source and is confirmed as a serious failure by a Competent Person as per **Guidelines for Serious Failure** (below), then the partner will immediately revoke the operative's license.

14.2.1 Guidelines for Serious Failure

Any employee with the number of endorsements shown in the table below will have their licenses revoked and the process of re-accreditation must be commenced.

| Endorsement Quantity | Recommended Action |
|----------------------|---------------------------|
| 3 | Licence Revocation |

Warning: Endorsements can only be removed when proof of an individual's re-accreditation has taken place

The following list of Serious Failures is not exhaustive, and action may be taken for other failures judged by the Competent Person as serious:

- Erection of low drop wire / Ariel cable.
- Disregard for safety causing unacceptable risk (including Stop Work notice).
- Failure to report a hazardous incident/accident.

- Failure to excavate in a safe manner and cause risk to people from ground collapse.
- Abusive or offensive conduct in dealing with Customers / Public.
- Disregard for the specifications / instructions issued.
- Negligent disregard for customers' property where damage was done and not reported.
- Failure to excavate in a safe manner and risk damage to utility plant.
- Failure to backfill and compact reinstatement(s) such that the integrity of the product was put at risk.
- Failure to comply with instruction from the Police or Highway Authority relating to the works.
- Failure to report damage to other utilities plant or attempting to effect improper repair.
- Failure to report damage to Openreach plant.
- Failure to carry out the work such that Openreach are unable to use the product.
- Negligent workmanship leaving or giving the potential for network affecting defects.
- Failure to comply with the annual re-accreditation requirements below.
- A performance review of Endorsements decides revocation is required

The application of the revocation of the operative's license will follow the same procedure as that for endorsement.

An operative whose license has been revoked will not be allowed to work in the Openreach network for the work activities that the revocation applies to. Where the revocation is safety related the operative will not be allowed to work on Openreach related contracts.

Revocations will be issued within 2 days from the identification of the operative responsible. (This may only be exceeded in extenuating circumstances where the operative concerned is not contactable, but the seriousness of the situation must be reflected at all times)

Revocation of a license must follow the prescribed appeals procedure. Whilst the time for thorough investigation and facility to appeal should not be underestimated, revocations should be applied to licenses within 5 working days from identification of the operative(s) responsible for the serious failure. It is expected that during this period the operative will not be working in the Openreach network for the work activities that the Revocation applies to

Revocation details must be entered on Smart Awards even if the partner no longer employs the operative in question.

Where the partner intends to re-accredit the individual a revocation can only be closed upon successful re-accreditation of the operative. This may follow a period of retraining to improve the operative's quality/safety performance, dependent on the circumstances

Where the partner does not intend to re-accredit the operative, the operative will be forbidden from performing the associated activities on the Openreach contract. Dependent on the circumstances this may require the operative being removed from the Openreach contract. The notes field in the Revocation document will be filled in accordingly

Re-accreditation on Revocation will include all modules pertinent to the Revocation and any modules covered by outstanding live endorsements

14.3 Critical Defects Where Accreditation Modules Are Unavailable

Where critical defects are identified which are not covered by current accreditation modules the partner will conduct a review in lieu of formal endorsement or revocation to establish a suitable course of action to either improve the individual's performance to an acceptable level or remove them from that particular work activity or the Openreach contract depending on the circumstances

15 Accreditation Notification – Note 9

Successful accreditation details must be added to Smart Awards NOPS. Openreach will not consider an accreditation to be complete until it is visible on NOPS.

Lead assessors & Assessors will need to hold a NOPS card showing all validated accreditations. The Lead Assessor or Assessor will need to have Openreach as a sponsor so that their accreditations are visible.

15.1 Re-accreditation

The partners training manager or his nominated managerial representative must perform a review of each operative's current accreditation modules on or before the 3rd anniversary of the operative's accreditation/previous review.

Safety

- All types of safety accreditations (Lead Assessor, Assessor and Operative) are valid for 3 years from the date of issue.
- Once expired, Openreach Safety accreditations cannot be renewed and must be replaced with the relevant Smart Awards module.

- Completion of the accreditation module(s) must be re-completed on or before the 3-year anniversary.
- No live endorsements must be shown on Smart Awards

Craft and Civils

- All types of Craft accreditations (Lead Assessor, Assessor and Operative) are valid for 3 years from the date of issue.
- Completion of the accreditation module(s) must be re-completed on or before the 3-year anniversary to avoid them expiring.
- Partner quality checks conducted on work performed can be used as evidence for re-accreditation of the operative. Again, the partner must perform the review and document this as outlined above to establish if the operative can be re-accredited.
- Lead Assessor and Assessor accreditation will also expire after 3 years if they are not renewed. For Lead Assessor accreditation renewal, the partner should contact The Openreach Accreditation and Quality Standards team who can, at their discretion, renew via an accreditation review or if required deliver full Lead Assessor re-accreditation.

The partner must ensure that no further work applicable to the module(s) concerned is either issued to or completed by any operative whose accreditation has expired.

Note: If live endorsements exist on Smart Awards at the time of the re-accreditation review, then suitable action as defined in the endorsement section of this document must be taken to close the endorsement(s) before the re-accreditation can be authorised.

15.2 Mandatory Training

- MT003

| |
|---|
| Warning: This module must be completed annually |
|---|

15.3 Multi-Skilled Operatives

Where an operative is multi-skilled the partner checks conducted on work performed at a higher associated skill level can be used as evidence for re-accreditation of modules of a lower skill level. Again, the partner must perform the review as outlined above to establish if the operative can be re-accredited.

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