



irtec Assessment Strategy

This document is to be used for the following irtec routes and levels:

- **Service Maintenance Technician Level** - Large Commercial Vehicle (LCV) including Heavy Vehicle Trailer (HVT) and Bus and Coach (B&C) routes
- **Inspection Technician Level** - Large Commercial Vehicle (LCV) including Light Commercial Vehicle (LCOMV), Heavy Vehicle Trailer (HVT) and Bus and Coach (B&C) routes
- **Advanced Technician Level** - Large Commercial Vehicle (LCV) and Bus and Coach (B&C) routes
- **Master Technician Level** - Large Commercial Vehicle (LCV) and Bus and Coach (B&C) routes
- **Commercial Tyre Technician** – Tubeless Commercial Vehicle Tyre routes
- **Large Electric Vehicle Technician:** High Voltage Isolation, Reinstatement and Safety (LEV)
- **Please note:** there is an additional `Supplementary Assessment Strategy` specifically for (LEV)

Specific detail for each irtec route will be identified either in this document or alternatively in schedules as indicated.

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General

1. Organisations wishing to offer irtec assessments **MUST** be approved by the IMI.
2. Each assessment must be assessed by occupationally competent and qualified assessors who must meet the criteria set out in this document.
3. Assessor pre-requisite requirements. All assessors nominated by the approved centre must hold an irtec Accredited Assessor Award. N: B. Accredited Assessor workshops are offered by IMI Accreditation and the approved IMI assessment centre will liaise with IMI Assessment Services to arrange training and assessment.
4. Centres must also ensure that an internal quality assurance process is in place for all irtec activities as per IMI requirements.
5. The centre must 'POST' within Centres Hub Notes section, all planned assessment activities which also includes the venue address details where assessments are conducted outside of the centre training facilities.
6. Practical assessments must be undertaken under controlled conditions within an approved assessment centre or alternatively (with prior permission from the IMI) an approved vehicle repair facility.
7. The candidate must not be subject to external influences during any part of the assessment process.
8. Vehicles used in assessment should be as follows:
 - **Service Maintenance Technician:** Live / customer vehicles **MAY NOT** be used for the purpose of Service Maintenance Technician assessments
 - **Inspection Technician:** Live / customer vehicles may be used for the purpose of Inspection Technician assessments, when this is conducted at the technician's normal workplace
 - **Advanced Technician:** Live / customer vehicles **MAY NOT** be used for the purpose of Advanced Technician assessments
 - **Master Technician:** Live / customer vehicles **MAY NOT** be used for the purpose of Master Technician assessments
 - **Commercial Tyre Technician:** Live / customer vehicles may be used for the purpose of Commercial Tyre Technician assessments
- **Please note:** there is an additional 'Supplementary Assessment Strategy' specifically for (LEV)

9. Vehicles / rigs used for practical assessment purposes must be placed in a suitable, safe and controlled environment to provide a 'fair assessment'.
10. For a candidate to achieve irtec recognition they must successfully complete all assessments; both Underpinning Knowledge (UPK) test and practical tasks within a twelve month window. (From the first assessment date to the final assessment date). Any assessments that have been successfully completed within this period will expire if all assessments are not fully completed.
11. Candidates who initially pass any of the assessments may 'bank' these for a maximum period of twelve months.
12. Candidates who are referred on any practical assessment tasks may retake these assessments within the twelve month period. A suitable period of time should elapse before re-assessment to ensure that the candidate has opportunities to improve their skills, competence or knowledge.
13. Candidates may retake the online knowledge test as many times as the centre considers appropriate, allowing a minimum of 2 hours to elapse between assessments. However, if they are not successful after three attempts, the centre should review whether the candidate is being assessed at the most appropriate level and be given access to suitable refresher training where necessary.
14. Assessment centres must keep a record of all assessments completed by each candidate (both successful and those referred) and make this record available to the IMI EQA/EQM when carrying out monitoring visits.
15. Prior to assessment, the approved centre must ensure that the candidate:
 - is eligible to take the assessments
 - has been registered 48hrs in advance of any assessments - please refer to the IMI operating manual for guidance
 - has been made aware of, had sight of and agreed to the irtec Code of Conduct
 - in the case of the Commercial Tyre Technician route, has been provided with the pre-assessment documentation

Note: details of the irtec Code of Conduct are available on the irtec website:

<https://irtec.org.uk/uploads/assets/uploaded/7a3f91ec-782c-4f9d-8935f1a1a4fa3de8.pdf>

16. The assessment centre must ensure that the irtec candidate provides photographic proof to confirm their identification. This process must be validated.

Positive identification of the candidate may be through a current and valid:

- Passport
- Driving licence ID card (showing photographic image of the candidate)

17. The assessment centre must take an electronic photograph of the candidate on the practical assessment day. The photographic image must be:
 - portrait style
 - of the candidate's head and shoulders only
 - on a clear/neutral background - similar to passport and driving licence, any photographs not within specification will be rejected by the IMI
18. Successful technicians will be issued with an irtec photo ID card and irtec Certificate which are valid for five years* by the Society of Operations Engineers (SOE); in addition the SOE will enter the individual's details onto the irtec register. *With exception of the Large Electric Vehicle which is three years.

Candidate requirements

19. Prior to candidate registration, approved assessment centres are required to provide the following guidelines to the candidate for the route for which they are applying.

Large Commercial Vehicle, Light Commercial Vehicle, Bus and Coach, Commercial Tyre candidates must have a minimum level of relevant industry experience. Technicians could count experience in another sub-sector as relevant such as LCV, LCOMV or Bus and Coach in an appropriate role as follows:

- | | |
|----------------------------------|---------|
| - Commercial Tyre Technician | 2 years |
| - Service Maintenance Technician | 2 years |
| - Inspection Technician | 3 years |
| - Advanced Technician | 3 years |
| - Master Technician | 5 years |

Or

Hold a relevant industry nationally recognised competence qualification (SVQ, NVQ, or VCQ) as well as a minimum of 1 year's post qualification experience in an appropriate role:

- | | |
|----------------------------------|-----------------------|
| - Commercial Tyre Technician | Level 2 qualification |
| - Service Maintenance Technician | Level 2 qualification |
| - Inspection Technician | Level 3 qualification |
| - Advanced Technician | Level 3 qualification |
| - Master Technician | Level 4 qualification |

Note: Large Electric Vehicle Technician: refer to the Supplementary Assessment Strategy.

20. An applicant should only be registered with the IMI once the approved assessment centre is satisfied that the candidate is aware of the level at which they are to be assessed.

Underpinning Knowledge Test

The IMI must ensure that all centres delivering the irtec Underpinning Knowledge (UPK) test(s) have the necessary personnel, facilities and equipment to meet the delivery requirements of the awarding organisation UPK test.

21. The UPK test is specific for the sub-sector to be assessed:

- Large Commercial Vehicle routes (including Trailer)
- Light Commercial Vehicle
- Bus and Coach
- Commercial Tyre
- Large Electric Vehicle

A candidate must achieve the agreed minimum pass mark of 60%.

Note: Pass mark for the Large Electric Vehicle test is 70%; the candidate **MUST** successfully pass this test before progressing on to the practical task.

22. The UPK test; apart from (LEV) may be completed either pre or post the practical assessments. It is recommended as best practice that the UPK assessment is conducted prior to any practical activities undertaken as part of the assessment process.

23. Inspection Technician:

- The irtec UPK test for Inspection Technician will include two sections, these are:
 - Legislation
 - O Licensing
 - Categorisation of Defects / Operator Compliance Risk Score
 - Health and Safety
 - Technical
 - Braking Systems
 - Wheels and Tyres
 - Steering and Suspension
 - Inspection Routines
 - Body
 - Transmission
- A candidate must achieve the agreed pass mark (60%) in both sections to achieve an overall pass of the irtec UPK test
- The Inspection UPK test should, as best practice, be successfully completed and passed prior to the practical assessment(s)

24. Where an organisation wishes to include an UPK test pertinent to their own business/organisation, this UPK test must cover all assessed knowledge outcomes relating to the specific route and be approved by the IMI before delivery of the test.

irtec Approved Centre Equipment Requirements

25. To deliver the irtec Large Commercial Vehicle, Light Commercial Vehicle, Bus and Coach, Heavy Vehicle Trailer, Commercial Tyre Technician or Large Electric Vehicle Technician practical assessments, the assessment centre is required to have the 'facilities, tools and equipment' identified in each irtec assessment for:
- Commercial Tyre Technician
 - Service Maintenance Technician
 - Inspection Technician
 - Advanced Technician
 - Master Technician
 - Large Electric Vehicle

Assessment vehicles - rigs

26. Approved centres must have a minimum number of vehicle(s) / rig(s) as specified in the irtec assessment(s) documentation.
27. Vehicle(s) / rig(s) used must be suitable for the delivery of the irtec practical assessments i.e. the vehicles have the appropriate technology applicable to the irtec practical assessments.
28. No more than one candidate may work on any 'one' vehicle / rig at 'any one' time.
29. The centre must ensure that vehicles used for irtec assessments are in a clean, roadworthy and reasonable condition. Vehicle(s) / rig(s) used for assessment purposes should reflect the current range of vehicles as used on the highway.
- Note:** *It is recommended by the IRTE (The Institute of Road Transport Engineers) that any vehicle used for irtec assessment purposes is no more than 8 years old.*
30. Any vehicle systems which are used to assess the candidate must be in full working order both before and after the irtec assessments.
31. Assessment vehicles must be checked regularly by authorised centre personnel (irtec assessors/workshop technicians), for additional damage and other system faults that may occur during the assessment centre vehicle ownership.

32. To maintain high standards in the delivery of irtec assessments; vehicles and testing rigs used for assessment in the training centre **MUST** be benchmarked against each individual irtec practical task; the aim to ensure resources used are suitable for the task and judgements made by candidates are consistent. The centre must devise their own benchmarking documents utilising the irtec assessment documentation as guidance. This will apply to all irtec routes. The IMI EQA will provide further guidance where requested (This does NOT apply to live/customer vehicles).
33. A rig may be used instead of a vehicle where the IMI agrees to it prior to the delivery of the practical assessment. Approval by the IMI must be requested by submitting a Centres Hub Enquiry Form.

Documents

34. Each workstation must be set up in accordance with the irtec 'Workstation Requirements' document.
35. Each candidate must be issued with the irtec 'Candidate Instructions' at each practical workstation.
36. Each practical task must be marked in accordance with the irtec 'Assessment Results Sheet'.
37. Only approved irtec assessors (IMI approval required prior to assessment) can mark the irtec candidate's Assessment Results Sheet.
38. Assessors must indicate clearly the assessor name (PIN or similar unique identifier), date of assessment and signature of the assessor on each Assessment Result Sheet. Approval for electronic recording systems must be requested by submitting a Centres Hub Enquiry Form.
39. All assessment documentation **MUST** be downloaded from the IMI website prior to assessment to ensure documents used for practical tasks are current. It is the centre's responsibility to ensure that current assessment criteria is being covered where electronic recording systems are utilised. If not, the assessment outcome may be **INVALIDATED** and the IMI may regard this as malpractice.
40. The candidate's name, together with their registration number and date of assessment must be completed on each assessment record.

Assessment set-up

Classroom/IT Suite set-up

41. Candidates must have computer workstations or laptops for their individual use to undertake the UPK online assessment.
42. Candidates are not permitted to access any electronic or hard copy information during the UPK online assessment. Electronic devices, including phones or smart watches, may not be used by candidates at any time during the UPK assessment. Centres must refer to IMI Operating Manual 5.1 and 5.2 for information regarding UPK online assessment requirements and procedures.

Workshop set-up

43. All workshop areas used for irtec assessment purposes must comply with the relevant legislation (Health and Safety at Work Act 1974 and any other regulations; for example; Electricity at Work Regulation 1989) that is applicable to the organisation and the type of irtec assessment being conducted.
44. The centre's responsible personnel, including assessors, must ensure that all the necessary risk assessments have been conducted prior to any assessment activity.
45. Vehicles must be placed in an area that:
 - allows the candidate to work on the vehicle unrestricted
 - allows the assessor to monitor and observe the assessment without interference to the candidate
 - prevents other personnel observing the task
46. The irtec practical task should be set up in accordance with the irtec 'Workstation Set up Requirements'. The approved centre should request clarification of any tasks by the IMI prior to assessment activity.
47. The removal/refitting of vehicle trim (shields/covers) are not assessed within the practical task. Any such trim that may disadvantage the candidate to carry out the practical task may be removed for practical reasons (time allowance/breakages).
48. Where necessary, place the vehicle on a lift or provide appropriate equipment or facilities to either raise the vehicle or allow access to the underside. Any vehicle raised must be supported by appropriate means.
49. The appropriate PPE (i.e. protective gloves and goggles) must always be available for the candidate. In the case of large Electric Vehicle; the appropriate, specialist and certified equipment **MUST** be available.
50. Where a vehicle is required to have a fault inserted, as described in the irtec practical assessment documentation, the vehicle must only have the fault as specified in the irtec documents, **NOT** multiple faults that will interfere with the assessment outcome.
51. All irtec assessors must hold a current irtec Accredited Assessor Award prior to assessing any candidates. **(See Point 3 above in this document).**

52. In addition to completion of the Accredited Assessor Award, irtec assessors are also required to comply with the following criteria:
- Minimum of 5 years' experience within the industry and 2 years' experience in an appropriate role relative to which they are to assess candidates (commercial vehicle, bus and coach or commercial tyre). The assessor must have technical knowledge equal to or above the level to which they are to assess
 - Assessors must ensure that their technical knowledge is kept up-to-date to the level they wish to assess through Continuing Professional Development (CPD)
 - In the case of Inspection Technician routes, assessors should have a good working knowledge of the Vehicle Inspection techniques and the current DVSA Inspection manual pertinent to the sub-sector they are assessing

Note: Large Electric Vehicle: also see Supplementary Assessment Strategy.

53. Candidate to assessor ratio:

- **Commercial Tyre Technician:** A maximum ratio of **three** candidates to one assessor for the practical assessment process
- **Service Maintenance Technician:** A maximum ratio of **three** candidates to one assessor for the practical assessment process
- **Inspection Technician:** A maximum ratio of **one** candidate to one assessor for the practical assessment process
- **Advanced Technician:** A maximum ratio of **three** candidates to one assessor for the practical assessment process
- **Master Technician:** A maximum ratio of **three** candidates to one assessor for the practical assessment process
- **Large Electric Vehicle:** a maximum ratio of **one** candidate to one assessor for the practical assessment process

54. Depending on the irtec assessment route undertaken, a workshop technician is required to:

- assist in resetting the tasks after each assessment has been completed and to resolve any technical issues that arise during the assessment day
- be a 'second person' when carrying out functionality tests such as steering or braking checks

Note: The assessor **MUST NOT** be the second person and **NEITHER MUST** another candidate be a second person.

Assessment Documentation Marking Criteria

55. Only approved assessors can mark the irtec candidate practical assessments according to the irtec Assessment Results Sheet.
56. Each candidate must achieve all the critical competences; these are defined in each of the irtec practical assessment documents.
57. Results may only be conveyed to candidates at the end of the assessment day and **not** during the assessment period. Alternatively the results may be delayed but only with prior agreement with the IMI.
58. All assessors must provide comments on the candidate's performance. These comments must be clearly documented and recorded on the assessor assessment documentation which will demonstrate that specific and accurate feedback to the candidate with their results has been provided.
59. The approved centre must provide feedback to each candidate in a supportive, constructive and confidential manner.
60. If an approved centre requires clarification of a results sheet 'critical competence', the centre should contact the IMI.

Internal Quality Assurance of irtec assessments

61. The centre must have an Internal Quality Assurance (IQA) programme/process which satisfies the IMI's requirement. **(See Point 4 above in this document).**
62. All Internal Quality Assurers nominated by the centre must be occupationally competent for the irtec route they wish to quality assure. The IQA must be able to challenge a decision made by an approved assessor. The IQA need not hold an irtec accredited assessor award but must be competent as noted. The IMI EQA will provide guidance where requested.
63. The IMI must approve each centre for the delivery of the irtec assessments (both route and level) before the centre may carry out assessments without a representative from the IMI being present.
64. In line with the IMI scheme criteria, approved centres must provide access to the IMI for the purposes of external quality assurance and make available all irtec documentation during these visits. **(See Point 5 above in this document)**
65. External Quality Assurance will be carried out by the IMI at least every twelve months to ensure that the centre continues to meet the irtec awarding organisation scheme criteria.
66. The approved centre must retain all irtec documentation; (minimum of Assessment Results Sheet) that details the candidate's results for a **minimum of six years**.

- 67. The IMI's External Quality Assurer has the authority to question an assessment decision which has been taken by the assessment centre.
- 68. The IMI External Quality Assurance team may carry out random unannounced visits to irtec assessment centres during candidate assessments as part of the quality assurance process.

Appeals and Complaints

- 69. All irtec documentation (minimum of Assessment Results Sheet) **MUST** be made available to an IMI External Quality Assurer, External Quality Manager or Quality and Compliance Manager for the purposes of any appeal or complaint.
- 70. An applicant or approved centre personnel must follow the centre's own appeals and complaints process in the first instance prior to invoking the IMI appeals and complaint procedures.