

# Workplace Observation Criteria

## Guidance for Assessors

### Dual Fuel Smart Meter Installer

The workplace observation should be designed to assess a broad range of the skills, knowledge and behaviours developed over the period of the apprenticeship. However, as a minimum the observer will need to assess and record how the apprentice completed the following criteria in their role as a smart meter installer. This guidance document sets out the indicators in terms of the Pass / Fail criteria for each area being observed. It also indicates which criteria must be observed and which criteria could be satisfied through questioning. Where questioning is used the question and the candidate's response must be annotated on the document.

Ref	Did the Candidate	Observer's Comments / Questioning
1.	Present themselves to the customers in a professional manner, communicate the requirements of their work activity and gain permission to	
	To Pass this the apprentice must be observed as follows: <ol style="list-style-type: none"> <li>1. Is appropriately dressed in line with any company requirements</li> <li>2. Shows company identification</li> <li>3. Is polite and communicates effectively with the customer</li> </ol>	The apprentice will Fail if any of the Pass criteria are not observed.
2.	Carry out a thorough and rigorous risk assessment of the work area identifying any hazards and risks and the measures necessary to maintain a	
	To Pass this the apprentice must be observed completing a risk assessment of the work area identifying any hazards or risks that exist and demonstrating how such risks can be mitigated. Where no risks or hazards exist then the observer may use questioning to determine understanding.	The apprentice will Fail if a risk assessment is not undertaken or if hazards are present on site and these are not identified or where no hazards exist that questioning is not answered to the required standard. Additionally they will Fail where they perform an unsafe act, such as unsafe working at height or unsafe manual handling practices.

Ref	Did the Candidate	Observer's Comments / Questioning
3.	Prepare the work area for the activity to be carried out, select the appropriate tools and equipment to be used and inspect and wear the	
	<p>To Pass this the apprentice must be observed as follows:</p> <ol style="list-style-type: none"> <li>1. Appropriate PPE is worn</li> <li>2. Preparing the work area to prevent any damage to customers property or premise</li> <li>3. Selecting appropriate tools for the activity to be performed and ensuring such tools and equipment is serviceable and within calibration where appropriate.</li> </ol> <p>The observer may use questioning to underpin understanding.</p>	<p>The apprentice will Fail if they:</p> <ol style="list-style-type: none"> <li>1. Fail to wear appropriate PPE throughout the operation</li> <li>2. Fail to appropriately protect the consumers property or premises</li> <li>3. Fail to select tools appropriate to the task being performed</li> <li>4. Fail to check that tools and equipment being used are serviceable and within calibration date where applicable</li> </ol>
4.	Prepare the equipment to be used and sequence the tasks involved in the order prescribed in the relevant codes of practice and industry standards?	
	<p>To Pass this the apprentice must be observed:</p> <ol style="list-style-type: none"> <li>1. Satisfactorily preparing the equipment to be used.</li> </ol> <p>The sequence of tasks involved for both gas and electric meter works must be correctly explained to the observer.</p>	<p>The apprentice will Fail if they:</p> <ol style="list-style-type: none"> <li>1. Fail to satisfactorily prepare the equipment to be used</li> <li>2. Fail to satisfactorily explain the sequence of tasks involved for both gas and electric meter works</li> </ol>
5.	Use tools and equipment to carry out the exchange of gas metering equipment safely and efficiently in compliance with the current relevant codes of practice and industry standards?	
	<p>To Pass this the apprentice must be observed using the correct tools and equipment required to safely exchange gas meter equipment. The meter reading should be recorded.</p>	<p>The apprentice will Fail if they:</p> <ol style="list-style-type: none"> <li>1. Fail to satisfactorily apply a temporary continuity bond prior to commencing the work activity or,</li> <li>2. Following a visual survey, fail to identify any hazards associated with the meter installation</li> </ol>

Ref	Did the Candidate	Observer's Comments / Questioning
6.	Carry out the required gas testing and assessment procedures needed to confirm the safe condition of the equipment and identify any required further actions as a result?	
	<p>To Pass this the apprentice must be observed:</p> <ol style="list-style-type: none"> <li>1. Completing a tightness test prior to removing the meter a satisfactorily interpret the results of the test</li> <li>2. Safely removing the gas meter and applying temporary caps to both connections</li> <li>3. Installing the replacement meter and complete a tightness test</li> <li>4. Purging the meter and installation in line with relevant codes of practice</li> <li>5. Confirming the working pressure is in line with requirements</li> <li>6. Visually inspecting the gas installation and appliances for:               <ul style="list-style-type: none"> <li>- Signs of spillage</li> <li>- Adequate ventilation</li> <li>- Satisfactory combustion</li> <li>- Any other unsafe situation</li> </ul> </li> <li>7. Implementing the appropriate unsafe situation actions</li> <li>8. Recording the new meter details and reading and completing the required post activity documentation</li> </ol> <p>Note: Where no unsafe situations are present on site the observer may use questioning to determine the apprentice's underpinning knowledge.</p>	<p>The apprentice will Fail if they:</p> <ol style="list-style-type: none"> <li>1. Fail to complete a tightness test prior to removing the meter or,</li> <li>2. Fail to satisfactorily interpret the results of the tightness test or,</li> <li>3. Fail to safely remove the gas meter or,</li> <li>4. Fail to complete a tightness test following installation of the replacement gas meter or,</li> <li>5. Fail to satisfactorily purge and re-commission the meter and installation in line with relevant codes of practice or,</li> <li>6. Fail to confirm the working pressure is in line with requirements or,</li> <li>7. Fail to visually inspect the gas installation and appliances or,</li> <li>8. Fail to correctly identify any unsafe situation following the visual inspection</li> </ol>

Ref	Did the Candidate	Observer's Comments / Questioning
7.	Use tools and equipment to carry out the exchange of electric metering equipment safely and efficiently in compliance with the current relevant codes of practice and industry standards?	
	<p>To Pass this the apprentice must be observed:</p> <ol style="list-style-type: none"> <li>1. Using the correct tools and equipment required to safely exchange electrical metering equipment</li> <li>2. Identifying any hazards associated with the meter installation</li> <li>3. Recording the meter readings prior to isolation of the supply</li> <li>4. Safely isolating the power supply in line with codes of practice ensuring the power supply cannot be inadvertently re-established</li> <li>5. Testing the power supply to ensure it is safely isolated</li> </ol>	<p>The apprentice will Fail if they:</p> <ol style="list-style-type: none"> <li>1. Fail to use the correct tools and equipment required to safely exchange electrical metering equipment or,</li> <li>2. Fail to identify any hazards associated with the meter installation or,</li> <li>3. Fail to safely isolate the power supply in line with codes of practice or,</li> <li>4. Fail to ensure the power supply cannot be inadvertently re-established or,</li> <li>5. Fail to test the power supply to ensure it is safely isolated</li> </ol>
8.	Carry out the required electrical testing and assessment procedures needed to confirm the safe condition of the equipment and identify any required further actions as a result?	
	<p>To Pass this the apprentice must be observed:</p> <ol style="list-style-type: none"> <li>1. Performing test procedures on completed installations i.e. polarity checks, no loose connections which could lead to overheating</li> <li>2. Confirming the new meter is operating correctly</li> <li>3. Recording the new meter details and reading and completing the required post activity documentation</li> </ol>	<p>The apprentice will Fail if they:</p> <ol style="list-style-type: none"> <li>1. Fail to perform test procedures on completed installations i.e. polarity checks, check connections are correctly made</li> </ol> <p>If the apprentice fails to:</p> <ol style="list-style-type: none"> <li>1. Confirm the new meter is operating correctly or,</li> <li>2. Record the new meter details and reading and completing the required post activity documentation</li> </ol> <p>then the observer may prompt this activity through questioning.</p>

Ref	Did the Candidate	Observer's Comments / Questioning
9.	Safely and efficiently install the appropriate Smart in-home communication system and complete the testing and commissioning of the in home display / software?	
	<p>To Pass this the apprentice must be observed:</p> <ol style="list-style-type: none"> <li>1. Selecting a suitable location for the smart metering communication system</li> <li>2. Installing the communication system for smart meters</li> <li>3. Commissioning, testing and completing the communication installation for smart meters</li> </ol> <p>The observer may use questioning to determine the apprentices knowledge of identifying and rectifying faults in smart meter communication systems.</p>	<p>The apprentice will Fail if they:</p> <ol style="list-style-type: none"> <li>1. Fail to select a suitable location for the smart metering communication system</li> <li>2. Fail to install the communication system for smart meters, in line with codes of practice</li> <li>3. Fail to correctly commission, test and complete the communication installation for smart meters</li> </ol>
10.	Politely and effectively provide the customers with practical advice on using the installed equipment and up to date information on the principles of energy efficiency?	
	<p>To Pass this the apprentice must be observed:</p> <ol style="list-style-type: none"> <li>1. Agreeing the position of the in-home display / software equipment</li> <li>2. Checking the in-home display / software equipment is operating correctly</li> <li>3. Demonstrating to the customer how the installation works providing them with any relevant user operating</li> <li>4. Completing all relevant installation documentation</li> </ol>	<p>The apprentice will Fail if they:</p> <ol style="list-style-type: none"> <li>1. Fail to check the in-home display / software equipment is operating correctly</li> <li>2. Fail to demonstrate to the customer how the installation works providing them with any relevant user operating</li> </ol> <p>If the apprentice Fails to agree the position of the in-home display / software equipment or complete all relevant installation documentation, the observer may prompt this activity through questioning.</p>

Ref	Did the Candidate	Observer's Comments / Questioning
11.	Store tools and equipment safely and securely and leave the customer's premises in a safe and secure condition?	
	<p>To Pass this the apprentice must be observed:</p> <ol style="list-style-type: none"> <li>1. Clearing away any debris</li> <li>2. Cleaning and storing tools safely</li> <li>3. Storing any excess equipment safely</li> <li>4. Making sure the work area is safe to leave</li> <li>5. Checking to ensure the site is clear of tools and equipment</li> <li>6. Confirming with the customer that the job is complete and that the customer is satisfied with the works</li> </ol>	<p>The apprentice will Fail if they:</p> <ol style="list-style-type: none"> <li>1. Fail to clear the site of all debris</li> <li>2. Don't store tools and equipment correctly</li> <li>3. Don't leave the work area in a safe and tidy condition</li> </ol>