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**RULES FOR THE
REGISTRATION OF OIL FIRING
TECHNICIANS AND COMPANIES**



**Registration
Services**

OIL FIRING TECHNICAL ASSOCIATION

RULES FOR REGISTRATION

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INTRODUCTION

This OFTEC Registration Scheme requires Registered Technicians and Businesses to comply with good practice as it is laid down in this document and OFTEC Technical Books, British Standard Codes of Practice and Statutory Instruments. It endeavours to ensure that all oil users who have work undertaken by an OFTEC Registered Technician can be assured that the work will be carried out compliantly to regional building regulations, and legislation.

Full Registration is only open to Technicians who have passed the assessments and meet the business operating conditions, which are laid down by this document. Technicians dealing with the public and with commercial customers must be covered by both Individual Technician's Registration and Business Registration parts of the OFTEC Registration requirement. Non-Operative individuals who have passed OFTEC assessments may be listed on the OFTEC Non-Operative database.

The scheme provides for the inspection of work undertaken by Registered Technicians and for the removal from the Register of said Technicians and Businesses which do not maintain the standard of work required.

OFTEC REGISTRATION SCHEME RULES

Section 1. Conditions for Business Registration

- 1.1 One Business Registration can cover any number of individuals working for the same Business. Businesses can be registered to undertake work in one or more of the OFTEC categories achieved by the Registered Technicians they include in their application for registration subject to the Technician holding the appropriate qualifications.
- 1.2 Sole Traders will require both Technician's Individual Registration and Business Registration.
- 1.3 With the written agreement of all parties, an Individual Technician may register with more than one Registered Business, but they must make clear on all documentation which Registered Business they are operating under contract for in each case¹.
- 1.4 Before Business Registration can be granted, all technicians engaged on work within the current scope of OFTEC, must carry appropriate OFTEC Individual Technician's Registration. The Business must demonstrate that they have sufficient qualified and Registered operatives for the scope and size of their operation.
- 1.5 Registered Businesses must pay the Business Registration fee required by OFTEC. A further fee will be due upon renewal of registration. Businesses that are Members of OFTEC do not have to pay this fee on top of their Membership fee for as long as they remain Members.
- 1.6 Registered Businesses will be issued with an OFTEC Certificate of Business Registration. The certificate must be returned to OFTEC if registration ceases for any reason.
- 1.7 Businesses must inform OFTEC immediately in writing of any alteration in their business status including trading name, addresses, contact details, ownership and affiliations of any kind to fuel supply and manufacturing organisations¹.
- 1.8 Businesses must inform OFTEC immediately in writing if they employ or cease to employ, Technicians¹ for whatever reason.
- 1.9 Businesses must make every endeavour to ensure that their Technicians comply with the requirements of Section 2.
- 1.10 The Registered Business is responsible for meeting the regional requirements of registration. (see Regional Annexes - Technical Book 3 for further information).

¹ OFTEC reserve the right to charge for administration costs.

Section 2. Conditions for Individual Technician's Registration

- 2.1 Technicians can apply to be registered with OFTEC under one or more of the categories where a valid certificate of competence is held.

To be Registered it is necessary for the Technician to be also covered by Business Registration (see section 1).

- 2.2 To be a Registered OFTEC Technician it is necessary to have passed an OFTEC assessment in the category of registration being applied for, (or equivalent defined by the Minimum Technical Competency of Individuals Undertaking Industrial & Commercial Heating Installation Work document). A registration application form (R250) must be fully completed. This must be submitted to OFTEC together with all payments due at the time of application.

- 2.3 A Registered Technician must be in possession of the latest editions of OFTEC technical books and have access to other documents issued or recommended for their use by OFTEC. A Registered Technician must maintain familiarity with the contents thereof and work in compliance with all the standards, regulations and methods of work set out therein. (See Appendix 1 for listing).

- 2.4 A Registered Service and Commissioning Technician must have personal possession or employer provision of a comprehensive tool kit including a combustion analyser or test kit. All instruments must be maintained at the level of calibration recommended by their manufacturers. (See Appendix 1 for comprehensive listing).

- 2.5 Registered Technicians must pay the initial Individual Registration fee required by OFTEC. A further fee will be payable on renewal of registration. The Technician's Individual Registration fee is personal to the Technician and does not give permission for any business activity, including activity as a self-employed person, as being OFTEC Registered (see Section 1 for Business Registration)

- 2.6 After Registration, Individual Registered Technicians will be issued with an OFTEC Identification Card and an OFTEC Certificate of Individual Registration. They should display the ID card at all times when they are engaged in the work for which they have been registered. The card should be produced upon request. The card must be returned to OFTEC if registration ceases for any reason.

- 2.7 Registered Technicians must inform OFTEC in writing promptly if their personal or business address and telephone number changes¹.

- 2.8 Technicians must inform OFTEC in writing immediately if their employment status changes for whatever reason¹.

¹ OFTEC reserve the right to charge for administration costs.

Section 3. Conditions for Non-Operative Technicians on the OFTEC Registration database

3.1 This is intended for qualified personnel who do not carry out installation and/or servicing and commissioning of oil fired appliances and equipment covered under their scope for third parties. For example, trainers, assessors, specifiers, architects, inspectors, Building Control Officers etc.

3.2 Individuals can apply to be registered by OFTEC under one or more of the categories where a valid certificate of competence is held.

If a non-operative registrant is employed by, or associated with an OFTEC Registered Business or Member company, OFTEC should be informed of this relationship.

3.3 To become registered as a non-operative with OFTEC it is necessary to have passed an OFTEC assessment in the class of listing being applied for, (or equivalent defined by the Minimum Technical Competency of Individuals Undertaking Industrial & Commercial Heating Installation Work document). A non-operative Registration application form (R252) must be fully completed. This must be submitted to OFTEC together with all payments due at the time of application.

3.4 A Registered Non-Operative must be in possession of the latest editions of OFTEC technical books, manuals, and have access to other documents issued or recommended for their use by OFTEC. Documents should be in their latest versions. The individual must maintain familiarity with the contents thereof and work in compliance with all the standards, regulations and methods of work set out therein. (See Appendix 1 for document listing).

Section 4. General Conditions of OFTEC Operative and Non-Operative Registration.

- 4.1 The length of OFTEC Registration is five years, subject to valid certificates of competence. (Certificates of Competence are normally issued for 5 years).
- 4.2 Technicians, Businesses and non-operatives must pay all fees and any other monies due to OFTEC promptly and in full. Any fees or other monies due at the time of leaving the non-operative Registration or non-operative Scheme must be paid at that time.
- 4.4 Registered Technicians and Businesses must undertake that their oil heating servicing and installation work will be carried out in a safe and workmanlike manner to ensure the best possible economy and performance from their customer's oil firing equipment.
- 4.5 All work undertaken must comply with the statutory requirements of the Building Regulations; Health and Safety provisions; and any other relevant legislation. (See Regional Annex in Technical Book 3 for further information)
- 4.6 All work undertaken must comply with all appropriate British Standard Codes of Practice and any European Codes which apply in the region, as contained in the relevant OFTEC Technical Book. All electrical work must be undertaken to comply with the latest edition of BS 7671 and additional regional requirements. (see Regional Annexes – Technical Book 3 for further information)
- 4.7 All work must be organised and undertaken in accordance with the requirements of relevant Technical Books.
- 4.8 Business must hold and maintain sufficient Public Liability Insurance, not less than two million pounds (2.8 million Euros) at all times. If such insurance expires and is not maintained or is invalidated OFTEC must be informed by the Registered Business and OFTEC Registration will be suspended until this requirement is met.
- 4.9 The suspension will take effect whether or not the Registered Business informs OFTEC of its failure to comply with the insurance requirements. Such suspension will commence immediately upon OFTEC becoming aware of such a failing whether or not it is the Registered Business that informs it of such.
- 4.10 OFTEC Registered Businesses must not sub-contract work for which they are registered to non-OFTEC Registered Technicians and Businesses. If sub-contracting is undertaken to other OFTEC Registered Technicians or Businesses, OFTEC will hold both parties responsible for the work for the purposes of disciplinary action in respect of any defective work.
- 4.11 If an OFTEC Registered Business sub-contracts work to a business that is not OFTEC Registered, OFTEC will hold the Registered Business responsible for the work. There are also regional variances to which sub-contracted works must by law adhere. (See 4.14)
- 4.12 If an OFTEC Registered Technician loses his identification card, this must be reported to OFTEC immediately. A fee may be charged for the issue of replacement cards.
- 4.13 In the event of an OFTEC Registered Business or Technician's registration not being renewed for any reason, any identification cards and registration certificate, which have been issued, must be returned to OFTEC.
- 4.14 Subject to regional variation requirement Registered Businesses must either notify relevant controlled services works via OFTEC's Works Notification Scheme or to Local Authority Building Control. (See Regional Annexes - Technical Book 3 for further information).

- 4.15 An individual employed by OFTEC in the capacity of inspector must not act in the capacity of assessor or internal verifier.
- 4.16 It is the responsibility of the Registered Business / Technician to ensure that their qualifications, registration, payments etc are current and kept up to date.

Section 5. Surveillance of Competence (Inspections)

- 5.1 A surveillance process is a requirement under OFTEC Competent Persons Scheme which monitors operative's individual competence. This surveillance shall be adequate to ensure that there is impartial evaluation to confirm the continuing competence of an individual. This will take the form of work inspections by appointed OFTEC Inspectors.
- 5.2 Upon Registration, and renewal¹ of Registration, businesses will be subject to a three month probationary period during which time a business audit/inspection will be undertaken by OFTEC to ensure that all current requirements are met. Businesses and technicians will be able to notify their works in accordance with the Building Regulations during this period, and their businesses will appear in the lists of Registered Businesses and Technicians available to the public from the OFTEC website.
- 5.3 Work Inspection appointments will be made with the Registered Businesses². Technicians must then be made available on the appointed date. Addresses for which Technicians have undertaken most recent work (within a six month period) can be supplied by the business or can be selected by OFTEC at their discretion. The addresses will be used by OFTEC solely for the purpose of work inspection.
- 5.4 OFTEC may be requested to investigate complaints about oil firing work undertaken by OFTEC Registered Businesses and Technicians. The Registered Business and Technician will be invited to attend any on-site investigations, subject to other parties consent in the event of a complaint investigation requiring a work inspection. Customer complaint information will remain confidential to OFTEC unless required in a Court of Law.
- 5.5 Any upheld complaints may result in charges payable to OFTEC for reimbursement of costs incurred relating to the investigation of the complaint³. Failure to adhere to these requirements can result in suspension of OFTEC Registration.
- 5.6 OFTEC will inform the Technician or Business of the outcome of any routine surveillance or complaint investigation proving the work to have been undertaken satisfactorily.
- 5.7 In the event of a routine inspection or complaint investigation proving the work to have been undertaken unsatisfactory, OFTEC will require the Business to undertake remedial action.
- 5.8 Any work found to be non-compliant or unsatisfactory must be rectified to OFTEC's satisfaction under a 28-day rectification notice and, normally, without charge to the customer. OFTEC Registrants must comply with any such directions and undertakings as a condition of registration.
- 5.9 If OFTEC judges the non-compliance to be very serious, or if a rectification notice is not complied with, OFTEC may decide to revoke registration from the Registered Business and/or from an individual Registered Technician working for that Business.
- 5.10 Registrants can appeal if they disagree with an OFTEC Inspector's findings or directions. Such appeals should be made in writing to the OFTEC Inspection Services Manager.

¹ *Renewals of Registration - a risk-based assessment based on previous history*

² *If a confirmed inspection appointment is not kept, a fee will be charged.*

³ *Costs of OFTEC Inspector visits which incur expenses.*

Section 6. Resignation, Suspension or Removal from the Scheme

- 6.1 Registered Businesses and Technicians may resign from the Scheme after giving written notice to OFTEC.
- 6.2 It is a condition of Registration that all fees, other monies, and all obligations to undertake remedial works or to pay compensation to others as advised by OFTEC will be satisfactorily undertaken or paid before the resignation becomes effective.
- 6.3 Registration may be suspended or revoked by OFTEC if a Registered Business or Technician fails to comply with the terms herein or brings OFTEC into disrepute.
- 6.4 The terms of the suspension or revocation of registration may include a direction to the Registered Business to undertake remedial works to OFTEC's satisfaction or to agree to arbitrary compensation. It is a condition of the Scheme that Registered Businesses, and Individuals agree to abide by any such terms imposed by the Rules of Registration.
- 6.5 An appeal can be made by the Registered Business and/or individual Registered Technician for a review of the case. Such appeals must be made to; the OFTEC Registration Services Manager (suspensions) or OFTEC Registration Services Director (revocations) in writing, within 28 days of notice of suspension/revocation of Registration being served. Appeals will be considered by the Registration Services Director, who will give the parties two weeks notice of the hearing. The time and location of the hearing will be arranged having due consideration for the ability of the parties to attend it. The parties will be notified of the result within two weeks of the hearing.
- 6.6 If the Registration Services Director upholds the suspension/revocation of Registration from a Registered Business or Technician, the OFTEC Scheme Committee (OSC) must receive submissions of appeal from the Registered Business and/or Registered Technician within 28 days of notification of suspension or revocation. The appeals can be made in writing or in person to the Chair of the OSC. The OSC's decision will be final and binding.
- 6.6 During the period of an appeal i.e. from the date of the initial loss of registration to the date of notification of the result of the appeal, the registration will be considered to be suspended. During such a period the Registrant must abide by the obligations of Registration but must not initiate any new use of the OFTEC logo, or description of themselves as OFTEC Registered, or display OFTEC certificates or identification cards.
- 6.7 A Registered Business or Technician from whom registration has been revoked can apply for re-registration after an interval of two years commencing from the date of the initial loss of registration. Re-registration will only be granted if OFTEC is satisfied that the issues, which led to the loss of registration have been rectified, and that the management of the business will be such as to ensure that similar issues will not re-occur. OFTEC may require Technicians to undertake training and re-assessment and a chargeable inspection, before re-registration can be granted.

Section 7. Conditions of use of the OFTEC Registration Logo (A Registered Trade Mark)

- 7.1 Registered OFTEC Businesses and Technicians may display the OFTEC Registration Logo in a form approved by OFTEC on letter headings, vehicles and premises and on other documents and advertisements subject to OFTEC approval.
- 7.2 The arrowhead Logo and the wording printed beneath it are subject to strict control by OFTEC and it is a condition of use that Businesses undertake to comply exactly and unreservedly with OFTEC's requirements with regard to such use of the Logo.
- 7.3 Registered Businesses and Technicians agree that they will immediately withdraw any documentation bearing the Logo and remove it from vehicles and premises should their OFTEC registration become invalid.
- 7.4 The OFTEC Logo and word 'OFTEC' is protected as a Registered Trade Mark of OFTEC.

Section 8. Registration Fees

8.1 Business Registration

On first applying to become a Registered Business the registration fee pertaining at that time must be paid to OFTEC. If Registration is not accepted the fee will be returned. OFTEC reserve the right to charge a 5% handling fee. A re-registration fee is required to be paid at each renewal.

8.2 Operative and Non-Operative Registration

On first applying to become registered, the relevant individual fee applicable at that time must be paid to OFTEC. If Registration is not accepted the fee will be returned. OFTEC reserve the right to charge a 5% handling fee. A re-registration fee is required to be paid at each renewal period.

- 8.3 The amount of the Registration fee and the periods for which they apply will be set by OFTEC and may be subject to change.

8.4 General

Business and Technician Registration commences from the date of initial Registration and/or renewal.

- 8.5 Following the registration of a Business or Technician, registration fees paid to OFTEC are non-refundable.

8.6 Additional Qualifications

When a Technician has already Registered and wishes to add further qualifications during the Registration period, completion and submission of an R/526 form plus the fee relevant at the time is required.

Appendix 1. OFTEC Operative and Non-Operative Requirements

	OFT101	OFT102	OFT103	OFT105E	OFT600a	OFT800
Technical Book 1	✓	✓	✓	✓	✓	✓
Technical Book 2	✓					
Technical Book 3	✓	✓	✓	✓	✓	✓
Technical Book 4	✓	✓		✓		
Technical Book 5		✓				
Technical Book 6			✓			
Domestic Heating Design Guide				✓		
CD/10 *	✓	✓		✓	✓	
CD/11 *	✓	✓				
CD/20 *			✓			
CD/21 *			✓			
CD/30 *				✓**		
TI/133D *	✓	✓		✓	✓	
Warning Stickers *	✓	✓	✓	✓	✓	
PJ - Pump, Pressure & Vacuum Gauges	✓					
Vap Burner, Flow Rating, Oil depth & Levelling Equipment		✓				
Combustion Analysis Equipment	✓	✓				
Flue Draft Measuring Equipment	✓	✓				
Smoke Gun & Papers	✓	✓				
Voltage Indicator/Multimeter with Fused Leads	✓	✓	✓	✓		
Boiler/Flue Cleaning Equipment (Brushes, etc.)	✓	✓				
Dust Soot Extraction Equipment (Vacuum)	✓	✓	✓	✓		
Domestic Hot & Cold Flow Rating Equipment	✓			✓		
Temperature Gauge (pipe surface temps)	✓	✓		✓		
Oil pipe forming tool	✓	✓		✓	✓	
Heating system / Appliance sizing system				✓		
Hand tools appropriate to job of work	✓	✓	✓	✓	✓	✓
Equipment for Servicing and Commissioning Works	✓	✓				
Hand / Power tools for Installation works.				✓	✓	
Oil Spill Kit - Small	✓	✓		✓	✓	
Oil Spill Kit - Large				✓	✓	
Water in oil tank identification equipment / media	✓	✓				

* = Or equal and approved.

** = or equal and approved only applicable in England & Wales.

Operative Requirement Only



Operative & Non-Operative Requirement



Appendix 2. Glossary of Terms

Business

A company that is Registered with OFTEC

Certification Body

A Body Accredited by a National Accrediting Authority (e.g. UKAS or equivalent).

Controlled Service Works (oil) England and Wales

The Building Act 1984 requires a person carrying out certain types of building works to give Building Notice or Building Regulations approval to Building Control. On 1st April 2002 an amendment to Regulation 12 of the Building Regulations came into force. This exempts OFTEC Registered installation, commissioning and servicing and tank installation and commissioning technicians from the need to give such notice when carrying out new installation work, replacement works or making a major change to the system in areas covered by their class of OFTEC Registration.

Disrepute (This list is not exhaustive)

Bringing the name or reputation of OFTEC into disrepute could include;

- works that are non-compliant to current British Standards or Building Regulations requirements
- failure to notify controlled service works
- failure to comply with rectification notices
- failure to cooperate with an OFTEC official
- failure to reply to communications
- failure to allow work inspections
- failure to carry out/follow OFTEC requests
- withholding relevant information pertaining to a complaint or inspection findings
- illusive behaviour.

Inspection

An on-site assessment of a Technicians work conducted during the Registration period.

Logo

The registered trademark of OFTEC. The delta device on a green field bearing the OFTEC name and symbol combining a striped tick inside an oil drop shape.

Non-Operative

It is recognised that a number of candidates applying for assessment and achieving certification of competence from an Accredited Certification Body may be employed in a non-operative capacity. Examples may be Assessors, Internal Verifiers, External Verifiers, Consultants, Inspectors etc.

OFTEC has specific rules for Registration of such certificate holders and these are detailed in section 3 of this document.

OFTEC (Oil Firing Technical Association)

OFTEC is a trade association made up of member companies and a Registration Body for businesses and registered technicians.

Operative

A person that carries out Controlled Service Works (oil) that is Registered with the OFTEC Competent Persons Scheme.

Regional

Various areas within the United Kingdom and the Republic of Ireland operate Building Regulations specific to their area and local government. Building Regulations requirements can vary regionally.

Technician

(See Operative above)

UKAS (United Kingdom Accreditation Service)

The organisation recognised by the UK Government as the national body for accreditation.

UKAS

21-47 High Street,

Feltham,

Middlesex.

TW13 4UNTel: +44 (0) 20 89178400

E-mail: info@ukas.com

Work Notification

Building Regulations require that in England and Wales, Guernsey, Jersey and the Isle of Man, Local Authority Building Control must be notified of any oil firing storage, installation and commissioning works undertaken and self-certificated by OFTEC Registered Businesses and Technicians. Furthermore, householders must receive a certificate of any works undertaken in their home, and that they comply with the Building Regulations in force on the date the works were completed in the above stated regions.

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Registration Services

OFTEC

Oil Firing Technical Association

Foxwood House, Dobbs Lane, Kesgrave, Ipswich, IP5 2QQ

Tel: 0845 65 85 080 Fax: 0845 65 85 181

enquiries@oftec.org www.oftec.org