

# WORKING STANDARDS



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## Working Standards

The working standards document is designed to assist members of the Portable Appliance Testing Trade Association (PATTA) to explain the methods and standards expected of an association member. The working standards provide a reference to assist in raising standards and improving the reputation of the Portable Appliance Testing Industry.

The objective of this document is to provide advice and information to its members and to recommend a minimum standard, which every member is expected to adhere to.

In this document, 'PATTA' and 'the Association' refer to the Portable Appliance Testing Trade Association, which is an association of professional PAT Testing companies, providing inspection and testing services to their customers.

The stated aims of PATTA are:-

- To raise standards in the PAT Testing Industry
- To improve the reputation of the PAT Testing Industry
- To share and promote good practice among PATTA members

In this document, the terms 'PAT Testing' and 'Portable Appliance Testing' are used to refer to safety checks, including inspection and testing, carried out on a piece of electrical equipment, normally connected to the mains via a plug and socket.

NOTE: This is in no way a statutory document – each individual member will be expected to complete what test procedures are deemed necessary at the time. However, to gain some consistency in the industry and to provide assurance to the members' clients that there are working standards in place, PATTA would expect all members to use this document as a 'minimum standard' for work carried out. Any queries regarding the content of these working standards should be referred to the Association.

PATTA reserves the right to modify or refine this working standards document – it is the responsibility of the individual member to ensure they are working to the latest version.

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## General Standards

### Responsibilities

PAT Testing is not a legal requirement, but employers and landlords do have a legal duty to make sure that any electrical equipment that they provide is safe. Members should possess a good understanding of the legal position and be able to communicate it to their customers. It should be noted that PAT Testing is a service provided by the member to the customer. It is the job of the PAT Tester to carry out the inspection and test but it is the customer's responsibility to take any further action as may be necessary. PAT Testers do not have any legal duty authority to immobilise or remove equipment (eg cutting the plug off a faulty appliance) but should always communicate carefully and thoroughly with their customers.

### Competence and Qualifications

The association does not insist on any member holding a specific qualification, but it is expected that members will be competent when joining the Association. All members must understand that they will be representing PATTA when they carry out the inspection and testing of electrical equipment (PAT Testing). It is therefore essential that members have enough skill and knowledge to be able to complete the appropriate activities.

The association expects all members to have completed some foundation training, however, formal qualifications on their own are not enough to prove competence. If any of the Association members use a third party to carry out the work i.e. a sub-contractor, that member must ensure that the person is competent, and the completed work meets with the Association's working standards.

The law does not require people carrying out PAT Testing to hold any 'official' qualification, but they should be competent. PATTA does not require members to possess a City and Guilds Qualification (eg 2377) although they should be able to demonstrate that they have received some training or have relevant experience in Portable Appliance Testing.

### Equipment

Association members will need to have access to a suitable PAT instrument or another piece of equipment such as a 18<sup>th</sup> Edition installation tester to be able to complete the inspection and testing. PATTA will not impose any brand or type of testing machine to be used, but members should make sure they have access to a machine suitable for the work they are performing.

The equipment used by the Association member must be able to complete a range of tests, depending on the appliance, the class and the environment, they may also need to access various adaptors depending on the equipment being tested. The association can provide the relevant information if requested. The testing equipment is expected to be in good condition and operating correctly. Although it is not a legal requirement to have testing machines calibrated on a regular basis, PATTA will expect that all machines should be checked for correct calibration periodically and if subject to heavy daily use or by employees at least yearly. The calibration certificate should be made available to the customer and/or PATTA if requested.

The association can provide information on suitable calibration services if requested and it will be the responsibility of the member to produce the certificate.

## Contact with Customers / Quotations

The customer has a right to expect a professional service from the member, from the first point of contact and finishes once the work has been completed.

There are many benefits of being a member of PATTA and members should be proud to make current and prospective clients aware of their membership. However, members should be mindful of the fact that when doing so, they represent PATTA and any failure in the provision of service or disagreement can also reflect badly on the Association.

Members should always ensure professionalism when dealing with customers – this includes responding to enquiries and providing accurate and timely information. It is recommended that members issue written quotations e.g. PDF attachments which includes the PATTA logo and their membership number.

The member should give clear and honest information to the customer and when negotiating for new contracts, the member should be clear and concise regarding what will be included in the service. A member may wish to include additional services as well as the routine PAT Testing service. These services offered may include replacement of damaged mains plugs, replacement of incorrect fuses, repairs to appliances, microwave leakage tests, socket checks etc. and should be made clear in the quotation.

All PAT Testing companies will have different pricing structures and methods of testing and PATTA does not impose any preferred method. e.g. charging for the cord set and appliance as one item or separately for each detachable mains lead. However, the Association does require that the member to be honest with their customers about their pricing structure. Experience has shown that some customers have been unhappy with the pricing structure and methods employed by companies and have complained about what they see as “hidden charges”. PATTA promotes that association members offer a “clear and transparent pricing structure” and members should ensure quotations reflect this objective.

## Insurance

It is important that PATTA members have insurance arrangements in place for the work that they carry out. As a minimum, members will need to have Public Liability insurance in place. If a member employs other people (as employees or freelance) then they will need to have Employer Liability in place. It may also be necessary to consider Professional Liability insurance; especially if the member is providing Health and Safety advice, or products insurance if they are selling equipment or goods to their customers .

## Branded Clothing

There is no requirement to wear branded clothing however, it is recommended that members add the PATTA logo to their own workwear.

Further information and the PATTA logo is available on request.

## Inspection and Test Procedures

The following information is provided as guidance only for PATTA members and it is not mandatory.

PATTA acknowledges that members have their own inspection and test procedures, in addition to their own preferred method of working and therefore does not intend to enforce any preferred method of working. However, the test processes used by the member will need to comply with the current edition of the IET Code of Practice (CoP) for In-service Inspection and Testing of Electrical Equipment, as well as industry best practices shared and promoted through the Association.

It is also recommended members familiarise themselves with British Standards BS EN 50699 and BS EN 50678 as appropriate – these supersede the 5<sup>th</sup> edition of the IET CoP but the procedures contained are broadly the same.

Pass limits do sometimes change over time and so it is important that members keep themselves updated with the latest guidance, further information is available on the PATTA website.

A preliminary inspection to determine whether the equipment can be disconnected from the supply and disconnect if permission is received. If permission is not received to disconnect the supply no tests other than a limited visual inspection should be completed. It should be recorded that the equipment has not been fully inspected or tested and noted accordingly.

## Visual Inspection

All appliances must be given a thorough visual inspection comprising of an in-depth check of the visual integrity of the plug, fuse, cable and case of the equipment under test. The appliance should be disconnected from the mains supply for a complete visual inspection to take place.

## Mains Plug

The mains plug inspection requires the plug to be opened (if it is a normal re-wireable type) and a check completed that the correct fuse is fitted, terminal screws are tight and wired correctly. Moulded plugs cannot be opened, but the fuse can be checked. Plugs that do not conform to British Standards (counterfeit or non-compliant) should be “Failed” and the customer notified. Any old-style plugs with non-insulated pins should be documented and the customer made aware or on agreement with the customer replaced. Cardboard wiring diagram sleeves should be removed and disposed of, except for items which are for resale (e.g. charity shop) where they should be left on for the purchaser. Note that PATTA’s advice is that old-style plugs with non-insulated pins are now considered a fail.

## Plug Fuse

Part of the visual inspection requires a check to ensure that the plug fuse meets British Standards and is the correct rating.

The main purpose of the plug fuse is to protect the cable. The person carrying out the inspection should check that the cable is thick enough to carry the current and that the fuse is rated such that the cable is protected. Manufacturers requirements should also be followed.

PATTA recommends that members carry out replacement of incorrect fuses and damaged / unsuitable mains plugs. The member may charge extra for this service and this should be agreed in advance with the customer.

## Counterfeit and Non-UK Standard Appliances

A growing problem is the number of counterfeit and 'fake' items, which are finding their way into UK businesses. Members of the Association should be able to detect and identify counterfeit items and should be expected to keep updated on current warnings and guidance. Updates are available on various sites (<https://www.electricalsafetyfirst.org.uk/product-recalls>), and members are encouraged to share information about non-standard items they find through the PATTA website and Facebook group.

The overall responsibility for purchasing items belongs to the customer or duty holder who cannot expect to hold an association member responsible if they failed to notice a fake item which is an accurate reproduction during the visual inspection on following combined testing. However, the members should be on the look-out for suspicious items and should be expected to notice the obvious fakes and counterfeits.

The best way to detect counterfeit and non-uk standard items is through the visual inspection. However, a small number of counterfeit IEC (kettle) leads and 2 pin (figure 8) leads have been found by members. The IEC leads often have a higher-than-expected earth value (often 0.25  $\Omega$  or similar) and the figure 8 leads sometimes can show an insulation breakdown (less than 0.5 M $\Omega$ ) in the mains plug. Therefore, members may choose to test these leads with a suitable tester, and those with a high earth resistance or low insulation value be removed from use.

## Electrical Tests

As a minimum the following tests should be carried out where applicable

- Class 1 Appliance – Earth Continuity, Insulation Resistance
- Class 2 Appliance – Insulation Resistance
- Extension Lead – Earth Continuity, Insulation resistance, Polarity

Appliances should be switched on before tests are carried out.

Members may wish to carry out additional tests such as Operation (load tests) or Leakage tests.

Test result limits and pass values should be in accordance with the current IET Code of Practice for In Service Inspection and Testing of Electrical Equipment and relevant British Standards.

## Class I Appliances

A piece of electrical equipment should be tested as a Class I appliance, if there is no additional information shown on the information/rating label.

## Class II Appliances

Class II equipment should bear the double square symbol. If the symbol is not visible, then the appliance should be tested as Class I equipment. The symbol should be visible on the rating plate of the appliance.



It should be noted that to carry out any meaningful tests on a class II appliance there must be a metal part of the appliance that the test probe can be connected to, if this is not possible then only a visual inspection will be required.

## Mains Cord Sets and Multi-way Extension Leads

Enough socket outlets should be provided so that multi-way adaptors and extension leads are not necessary however all mains power and multi-way extension leads should be given a thorough visual inspection comprising of an in-depth check of the visual integrity of the plug, fuse, cable and case of the equipment under test.

The visual inspection must always include the unwinding of the cable from the drum and checking the cable for damage. Members must examine the cable cross section and ensure that the cable is suitable for use and environment and the customer be made aware of any unsuitable or homemade leads in use. All or some of the following tests should be completed subject to the lead under test and the appropriate allowances made for the length of the cable.

Pass result values should be in accordance with the current IET Code of Practice for In Service Inspection and Testing of Electrical Equipment and relevant British Standards. More information about test results and pass limits is available on the PATTA website.

## Fixed Wired Appliances

The testing of fixed equipment or appliances is more difficult because of their connection to the fixed wiring of an installation. Usually, these items are connected via an isolator or fused connection unit (FCU). This doesn't mean that only visual inspections are required for these types of equipment, they should still receive a full combined inspection and test at relevant intervals. PATTA has issued clear guidance explaining the difference between a portable appliance (i.e. one connected via a plug and socket) and a fixed appliance (hard wired into the fixed installation.)

It is vitally important that the person carrying out the inspection and testing is competent to carry out safe isolation procedures. These are not normally taught on a PAT Testing course. If a member is not trained in

these safe isolation procedures, they should limit their services to testing items with a plug. PATTA can provide further guidance on safe isolation procedures and information about testing fixed appliances.

There is a risk of 'fixed' appliances being missed. It is possible that they will not be tested as part of the Electrical Installation Condition Report (EICR) and might also not be included in an organisation's Portable Appliance Testing regime. Clear communication between the customer and member should help to ensure that all items of electrical equipment are identified and checked as appropriate.

## Functional Operation

The purpose of PAT Testing is to determine whether appliances are safe for use, it is not necessary for a member to check the correct operation of each appliance, unless the functional operation is dependent upon its safety. e.g. it may be appropriate to complete a "run test" on a power tool such as a rotary drill, as worn bearings may constitute a fault. Some PAT Testing machines can carry out a powered test, otherwise the item may be connected to the mains supply and operated as normal. Members should only operate customers' equipment with permission and should follow any local rules given by the customer.

## Test Results

An association member is responsible for the production of a set of results to accompany the completed work and be sent to the customer after the work is completed. PATTA accepts that a member might require full payment for the work before supplying the results and certificates, although this should be agreed in principle with the customer prior to the work being started.

There is no preferred or mandatory standard for the test results and inventory. As a minimum, they should contain a list of the items tested, information about the visual inspection and the series of tests completed. In addition to the list of items tested the member may also provide a single-page certificate which the customer can use as evidence that PAT Testing has been carried out. Whatever system is used, it is important that the customer can easily identify any appliances that have failed the test, so they can take the appropriate follow-up action.

## Labels

Although there is no law requiring items to be labelled, it is considered good practice to label each item after testing. Labels should include, as a minimum: -

- Date of the test (the month and year is sufficient)
- Person or organisation carrying out the test
- A unique identifier number or code which relate the item tested to the results.

It is not recommended that a retest date is put onto the label, but some customers might require it, so members should be able to comply with customers' requests in this regard.

## Terms of Use

PATTA reserves the right to change these Working Standards at any time without prior notice. If any changes are made, the revised standards shall be posted on the website. Members are responsible to ensure they are working to the latest version.

## PATTA Working Standards – Summary Page

**Document Title:** PATTA Working Standards

**Version:** V3

**Issued by:** Standards Director, Portable Appliance Testing Trade Association (PATTA)

**Purpose:** This document provides guidance for members of PATTA on professional conduct and inspection/testing standards. It outlines minimum expectations to ensure safe, competent, and reputable delivery of Portable Appliance Testing services in the UK.

**Scope:**

While not statutory or legally binding, this Working Standards document represents best practice and industry expectations. It aligns with the *IET Code of Practice for In-Service Inspection and Testing of Electrical Equipment (5th Edition)* and relevant British Standards including *BS EN 50699* and *BS EN 50678*.

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**Key Objectives:**

- Raise professional standards in PAT Testing
  - Improve industry reputation
  - Promote consistent and safe practices across all PATTA members
  - Support members with professional guidance and shared good practice
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### Summary of Member Expectations

**Professional Conduct:** Clear communication, honest quotations, branded appearance, and respect for customer premises and equipment.

**Competence:** Members must be demonstrably competent, with foundation training and a working knowledge of safe inspection/test practices.

**Equipment:** PAT testers must use suitable, serviceable test equipment, calibrated annually if heavily used.

**Procedures:** All inspections and testing should align with the latest IET CoP and industry best practices.

**Documentation:** Members must supply clients with clear test results, inventory of tested items, and clearly label tested appliances.

**Insurance:** Public Liability (and Employers' Liability if applicable) insurance is required.

**Fixed Equipment:** Only tested by competent members trained in safe isolation procedures.

PATTA Member Compliance Checklist

Use this checklist to verify that your business complies with the PATTA Working Standards (V3). This can be used for internal audits, staff onboarding, or PATTA membership checks.

Category	Compliance Item	Tick ✓
<b>Professional Standards</b>	Clear pricing and quotations provided to clients	
	PATTA logo used professionally in branding or documentation (optional but recommended)	
	Branded clothing and ID worn while working (recommended)	
	Clients provided with clear test results and inventory post-inspection	
	Labels applied to tested equipment with required details	
	Customer communication is clear, professional, and respectful	
<b>Training &amp; Competence</b>	PAT tester has foundation training or demonstrable experience in PAT	
	Awareness of latest IET Code of Practice (5th Ed) and relevant British Standards	
	Understanding of safe isolation procedures (if testing fixed appliances)	
	Subcontractors (if any) are vetted for competence and follow PATTA standards	
<b>Equipment Standards</b>	PAT testing equipment suitable for intended use	
	Testers calibrated (recommended annually for frequent use)	
	Calibration certificate available if requested by client or PATTA	
<b>Insurance</b>	Public Liability insurance in place	
	Employers' Liability (if staff employed)	
	Professional Indemnity (if providing H&S)	
<b>Technical Procedures</b>	Understand the importance of the visual inspection	
	Class I: Earth Continuity + Insulation Resistance (as minimum)	
	Class II: Insulation Resistance or visual only if no exposed metal parts	
	IEC mains leads and extensions tested correctly.	
	Fixed appliances tested only by staff with additional training	