

**Middleton Railway Trust Ltd.**  
**Shunter's Test – Description of Knowledge Required – Version 2**

The purpose of a shunter's test is to establish that the person being tested has:

- (i) sufficient knowledge and understanding of the Company Rules and Train Operating Regulations to be able to follow correctly the procedures that they specify that are applicable to the duties that a shunter is required to undertake;
- (ii) sufficient knowledge and understanding of the precautions that must be taken when carrying out the duties that a shunter is required to undertake; and
- (iii) the practical ability to undertake competently the tasks required for these duties.

The following list of these aspects forms the basis for conducting such a test, and specifies the detailed requirements for each aspect.

**Aspects of the Duties for which Knowledge and Understanding of Procedures and Precautions is to be Assessed**

**1. Before trains are run.**

1.1 Commencing duties

- (i) Requirements for signing-in, and significance of signing-in;
- (ii) Importance of reading notices, and the significance of the information that should be in them.

1.2 Authorisation of operations

- (i) Establishing the requirements for the operation of trains (passenger or goods);
- (ii) Establishing the requirements for the formation of trains (passenger or goods);
- (iii) The roles of the SRO and the pilotman in multiple train operation.

1.3 General safety precautions

- (i) The requirements for appropriate clothing;
- (ii) The importance of working to instructions, and of a clear understanding of instructions;
- (iii) General conduct, and the avoidance of hurried or other hazardous actions.

1.4 Specific precautions for safety in the vicinity of the tracks

- (i) The importance of following appropriate walking routes;
- (ii) The importance of maintaining a good lookout;
- (iii) The conditions under which tracks may be crossed.

**2. Marshalling and operation of trains.**

2.1 Coupling and uncoupling of vehicles

- (i) The importance of checking vehicle brakes;
- (ii) The importance of achieving a clear understanding with the driver before going between vehicles;
- (iii) The operation of three-link, instanter and screw couplings;
- (iv) The procedures for coupling and uncoupling vacuum-fitted vehicles.

2.2 Responsibilities for setting turnouts

- (i) The role of the driver in determining required shunting movements;
- (ii) The role of the shunter in setting turnouts, and checking that switches are properly closed;
- (iii) The responsibility of the driver for ensuring that turnouts have been set correctly.

2.3 Precautions for shunting into and out of sidings

- (i) Checking for and warning people in the vicinity of the sidings, or in vehicles in the sidings;
- (ii) Ensuring that wagon doors are adequately fastened;
- (iii) Ensuring that doors, gates or other potential obstructions in the sidings are clear of the track.

2.4 General requirements for signalling to train crews

- (i) The importance of ensuring adequate visibility for signals;
- (ii) The conditions under which hand signals, flag signals or lamp signals should be used.

2.5 Regulating the speed of shunting movements

- (i) The importance of appropriate positioning and visibility when signalling for a shunting movement;
- (ii) The responsibility of the shunter for controlling the speed of a shunting movement, and signalling to the driver;
- (iii) The responsibility of the driver for working to the shunter's signals.

2.6 Duties as a flagman at level crossings, and associated precautions

- (i) Operating to instructions from a pilotman or train crews;
- (ii) The procedure for stopping road traffic, and the need for high-visibility clothing;
- (iii) The requirements for signalling to train crews.

### **3. After trains have been run.**

#### 3.1 Disposal of locomotives and rolling stock

- (i) Requirements for the stabling of locomotives and rolling stock, and associated shunting operations;
- (ii) Procedures and precautions for disposing of locomotives, and the role of a shunter in them.

#### 3.2 Reporting of incidents or defects

- (i) Situations which a shunter should report to a driver;
- (ii) Situations which a shunter should report to a senior engineer.

### **Description of Practical Competence Required**

#### 4.1 Operate correctly the Moor Road Ground Frame and other turnouts

- (i) Release and lock the ground frame;
- (ii) Set the ground frame for each of the standard movements controlled by it;
- (iii) Identify the correct clearance points for movements controlled by the ground frame;
- (iv) Operate a turnout controlled by a spring lever, and check that it has closed correctly.

#### 4.2 Use hand signals correctly

- (i) Signals for the following movements: come towards, move away, slow down, stop, create vacuum.

#### 4.3 Use lamp signals correctly

- (i) Signals for the following movements: come towards, move away, slow down, stop;
- (ii) The significance of each of the standard colours for lamp signals (white, green, yellow, red).

#### 4.4 Use correct procedures for coupling and uncoupling of vehicles (including vacuum braked ones)

- (i) Check vehicle brakes before coupling or uncoupling, and set them as required;
- (ii) Achieve a clear understanding with a driver, particularly before going between vehicles;
- (iii) Operate three-link and instanter couplings;
- (iv) Use the correct sequences for coupling and uncoupling vacuum-fitted vehicles.

#### 4.5 Operate vehicle brakes correctly (including locomotives that are not under power)

- (i) Apply and release hand lever wagon brakes, and use a brake stick correctly;
- (ii) Apply and release hand wheel wagon brakes or coach brakes;
- (iii) Apply and release steam locomotive hand brakes.