

I Fork lift truck operator training

It is a legal requirement that employers ensure fork lift truck operators have completed required training.

Approved code of practice

The Health and Safety Executive's (HSE) Approved Code of Practice (ACOP) and guidance **L117 Rider operated Lift Trucks** is aimed at employers and those responsible for the safe operation of fork lift trucks, as well as those in control of worksites, the self-employed, managers and supervisors.

Fork lift truck operator training is to be consistent with the standards outlined in the ACOP L117, as summarised later in this Fact Sheet.

Obligation to provide basic training

Employers should not allow anyone to operate, even on a very occasional basis, fork lift trucks who have not satisfactorily completed basic training and testing as described within the scope of ACOP L117. Except for those undergoing such training under adequate supervision.

While ACOP L117 is not law, it has been produced under section 16 of the **Health and Safety at Work etc Act. 1974** and has special status in law.

Legislation

Under Regulation 9 of **The Provision and Use of Work Equipment Regulations 1998** (PUWER) employers are required to 'ensure that all persons who use work equipment have received adequate training for purposes of health and safety.

Including training in the methods which may be adopted when using the work equipment, any risks which such use may entail and precautions to be taken'.

The Lifting Operations and Lifting Equipment Regulations 1998 (LOLER) deals with specific hazards/risks associated with lifting equipment and lifting operations. If you provide lifting equipment, including a fork lift truck for use at work, or you have control of the use of lifting equipment, you should make sure that every lifting operation is:

- Properly planned by a competent person. This is usually the operator for most fork lift-truck work, so they should have the appropriate training, knowledge and expertise. For unusual complex tasks or situations, specific risk assessments and planning are likely to be required.

Employers have a general duty under **Section 2 of the Health and Safety at Work etc. Act 1974** (HSW Act) to provide information, instruction, training and supervision to ensure the health and safety of their employees

The Management of Health and Safety at Work Regulations 1999 also place duties on employers to provide training.

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Selection of instructors

When arranging training, employers should satisfy themselves that it is in accordance with ACOP L117. Operator training should only be carried out by instructors who have themselves undergone appropriate training in instructional techniques and skills' assessment.

They should give instruction only on the types of fork lift truck and attachments for which they have been trained and successfully tested as operators. Instructors also need sufficient industrial experience to enable them to put their instruction in context and an adequate knowledge of the working environment in which the trainee will be expected to operate.

What should training include?

Operator training should always include three stages:

Basic training

Basic training needs to fully cover the skills and knowledge needed to safely operate the type of fork lift truck and handling attachments, if any the trainee will be required to use, including being aware of the risks from lift-truck operations. As well as those directly related to the operation of trucks, include associated tasks, such as the hazards associated with refuelling.

Given the wide range of fork lift trucks, operator experience and company requirements, some training organisations will arrange for a basic course to be tailored to a client's requirements.

Specific job training

Specific job training is a further essential element of training. It will normally follow the completion of basic training but may be combined or integrated with it. It will be tailored to the employer's particular needs and include, where appropriate:

- Knowledge and understanding of the operating principles and controls of the fork lift truck to be used, especially where these relate to handling attachments specific to the job, or where the controls are different from those on which the operator has been trained, to be repeated whenever the design of the truck is changed.
- Routine inspection and servicing of that truck in accordance with the operator's handbook or instructions issued by the manufacturer, in so far as they may reasonably be carried out by the operator, to be repeated whenever the design of the truck is changed.
- Use of the fork lift truck in conditions that the operator will meet at work, for example gangways; loading bays; racking; lifts; automatic doors; confined areas; cold stores; slopes; rough terrain; loading platforms; other vehicles; and bad weather.
- Instruction on site rules, for example site layout; one-way systems; speed limits; general emergency procedures; use of protective clothing and devices including operator restraints and eye and hearing protection; work near excavations and overhead lines; and other hazards.
- Training in the work to be carried out, for example loading particular types of vehicle; handling loads and materials normally found at that workplace, including assessing weight; using the lift truck fitted with working platforms where appropriate.
- Safe systems of work, which should include custody arrangements to ensure keys are never left in unattended lift trucks, or where they are freely available, to prevent unauthorised operators using them.

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Familiarisation training

Familiarisation training is the third stage of training. This should be carried out on the job and under close supervision, by someone with appropriate knowledge. It could include:

- Applying, under normal working conditions, the skills already learned in basic and specific training, starting with simple tasks and developing to the more complex ones.
- Becoming familiar with the lift truck activities of the employer.
- Familiarisation with site layout, local emergency procedures and any other feature of the work which it is not practicable to teach off the job.

Authorisation

After employees have successfully completed all three elements of training, you should give them written authorisation to operate the fork lift truck(s) they have been trained to use. You could issue authorisations on an individual basis and/or record them centrally.

They should state the operator's name, the date of authorisation, the types or categories of fork lift truck to which they relate and any special conditions, such as operational limitations.

You should not allow anyone to operate fork lift trucks on any premises without authorisation, except a trainee under close supervision. You will also need to ensure authorised operators continue to be competent through regular monitoring and assessment.

Operator competence

To ensure that the operator is fully competent and aware of current principles, refresher training will need to be given at intervals suitable to the needs and capabilities of the operator. Employers should determine suitable intervals by the use of performance monitoring and assessment.

Refresher training frequency

There is no specific time period after which you need to provide refresher training, however, a common interval for refresher training is 3-5 years, but this will depend on the specific circumstances of particular operators.

Also you may decide that automatic refresher training or a retest, after a set period of time is the best way to make sure employees stay competent. Where you adopt this approach, you will still need to monitor performance in case operators need extra training before the set period ends.

Monitoring and assessment

Fork lift-truck operators even those who are trained and experienced, need to be routinely monitored and where necessary, retested or refresher trained to make sure they continue to operate fork lift trucks safely.

You can identify the need for further training using a formal monitoring and assessment process, carried out by a suitably competent person, such as an instructor. This assessment should be formally timetabled e.g. a retest, to make sure it is done at reasonable intervals.

Where an operator fails this assessment, arrange further training for them. You may find it useful to record these assessments in operators' personnel records.

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UKMHA further guidance

Also see UKMHA Fact Sheets 1, 2, 6, 9, 12, 14, 16, 19, 24 and 28 for further information.

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The information in this Fact Sheet has been assembled and interpreted to give truck owners and users basic guidance on frequently asked questions. Further important information will be given in the quoted reference documents. Responsibility for meeting the safety obligations discussed rests with the employer, and the UKMHA will not accept liability for any problem arising as a result of the content of this document. Technical Bulletins, containing more detailed information and updated as appropriate, are made available free to members of the **UKMHA SAFE USER GROUP**.

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