

Operator training of fork lift truck engineers, sales personnel etc

It is a legal requirement that employers should not allow anyone to operate fork lift trucks even on a very occasional basis, who have not satisfactorily completed the appropriate training and testing.

The Facts and the law

Employers have a legal obligation to ensure that all fork lift truck (FLT) operators, including engineers, sales personnel and FLT delivery drivers (e.g. HGV drivers) are trained and receive refresher training. Except those undergoing such training under adequate supervision.

Employers are to comply with:

Regulation 9 of **The Provision and Use of Work Equipment Regulations 1998** (PUWER), which states that every employer shall ensure that all persons who use work equipment (including fork lift trucks) 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.

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

The Lifting Operations and Lifting Equipment Regulations 1998 (LOLER) deals with specific hazards/risks associated with lifting equipment, including fork lift trucks and lifting operations. If you provide lifting equipment for use at work, or you have control of the use of lifting equipment, you should make sure that every lifting operation involving a lift truck 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;
- Appropriately supervised;
- Carried out in a safe manner using suitable equipment.

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

Approved code of practice

The Health and Safety Executive's (HSE) Approved Code of Practice (ACOP) and guidance **L117 Rideroperated Lift Trucks** relates to rider-operated 'stacking' fork lift trucks. Although the employer's duty to provide training under PUWER also extends to operators of all other types of lift trucks. Operators of lift trucks not covered by the ACOP L117, (for example pedestrian-operated trucks, straddle carriers and 'stand-on' pallet trucks) that do not lift materials for stacking will also need training.

Fork lift truck operator training is to be consistent with the standards outlined in ACOP L117.

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.

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The training options

Anyone who operates a fork lift truck even on an infrequent basis, needs training to a recognised standard, including engineers, sales personnel and FLT delivery drivers (e.g. HGV drivers). It is crucial that these groups understand how to operate safely, as their job roles often require them to work at customers' sites.

Previously the only option for these personnel was to undergo a 'full' operator course. For a novice operator, this would be a 5 day basic training course, based on 3 delegates participating.

However, fork lift truck training accrediting bodies such as the **Association of Industrial Truck Trainers** (AITT), recognised that many engineers, sales personnel and FLT delivery drivers (e.g. HGV drivers) are often not required to carry out the full range of tasks (e.g. loading/unloading) regularly completed by employed fork lift truck operators, and have therefore introduced a 'Restricted' training course.

A 'Restricted' training course provides within a reduced course duration, the majority of engineers, sales personnel and FLT delivery drivers (e.g. HGV drivers) with the necessary knowledge and skills (excluding loading and unloading) to complete their roles and fulfil employers legal obligations.

For a novice operator, a 'Restricted' training course for one category of fork lift truck takes 2 days. Additional fork lift truck categories can be added, taking half a day per category.

What if engineers etc are required to load and unload?

If employers require any fork lift truck operator, including engineers, sales personnel and FLT delivery drivers (e.g. HGV drivers) to load or unload, a 'Restricted' training course will not be adequate.

Completion of 'full' operator training and testing, as described within the scope of ACOP L117 will be required.

Refresher training obligation

Refresher training is also a legal requirement and should be in line with company policies following the completion of a risk assessment.

As engineers, sales personnel and FLT delivery drivers (e.g. HGV drivers) often work at customers sites, it may be a requirement for them to undertake refresher training in line with customer's requirements.

Notwithstanding, refresher training is to be consistent with the standards outlined in ACOP L117, which proposes that refresher training should be provided to all fork lift truck operators every 3-5 years.

Depending on company policy, this may be conducted more often according to frequency of use, near misses etc.

Regular refresher training will ensure operators:

- Maintain good driving habits
- Learn new skills where appropriate.
- Reassess their abilities

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Refresher training or retesting might also be appropriate where operators:

- Have not used trucks for some time.
- Are occasional users.
- Appear to have developed unsafe working practices.
- Competence or safety performance gives cause for concern.
- Have had an accident or near miss
- Have changed their working practices or environment.
- Variant of fork lift truck or handling attachment is significantly changed.

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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