

What are the three stages of forklift training?

L117 states that there are three elements of forklift training which must be completed before an operator should be allowed to use MHE equipment. Most companies accept the need for the initial basic training, but many fail to deliver the two follow-up stages: **specific job training and familiarisation training**.

THE LAW

Employers have a general duty under Section 2 of the Health and Safety at Work etc. Act 1974 and under The Management of Health and Safety at Work Regulations 1999 to provide information, instruction, training, and supervision to ensure the health and safety of their employees. Regulation 9 of The Provision and Use of Work Equipment Regulations 1998 (PUWER), requires employers to ensure that all persons who use work equipment (including forklift 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. Sites operating fork lift trucks, or other lifting equipment, are required to comply with The Lifting Operations and Lifting Equipment Regulations 1998 (LOLER) which requires lifting operations to be planned and supervised by suitably competent persons. For many day-to-day operations, the lift may be planned by the operator, so they should have the appropriate training, knowledge and expertise. However, for unusual complex tasks or situations, specific risk assessments and planning are likely to be required.

Age Limits Children under the age of 16 should never be permitted to operate lift trucks. Restrictions and special conditions apply for young persons under the age of 18. Refer to FS01 for further information. Age limits relating to Maximum Authorised Mass apply when operating works trucks on the public highway.

APPROVED CODE OF PRACTICE

The Health and Safety Executive's (HSE) Approved Code of Practice 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.

Although the scope of L117 is limited to rider-operated stacking lift-trucks, operators of types of truck not covered by the Approved Code of Practice, for example pedestrian-operated trucks, 'stand-on' pallet trucks that do not lift materials for stacking, and straddle carriers, will also need training.

Forklift 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

REQUIRED TRAINING

Personnel who have not completed training may operate a truck for the purposes of training only, and only under the direct supervision of the trainer.

Operator training should emphasise safe and proper operation to avoid injury to the operator and others, and to prevent property damage. It comprises three stages, all of which are obligatory:

Basic training Basic training should cover the skills and knowledge needed to safely operate all of the types of forklift truck and handling attachments the trainee will be required to use. Realistic loads and a working area representative of actual site conditions should be utilised, and all operational and associated tasks should be covered, e.g. peruse inspections, refuelling, stacking, refuelling, etc.

This training should be conducted in an area away from other trucks, obstacles, and pedestrians, for example at a suitable training centre or in a segregated area within the employer's premises.

Upon completion of basic training, the trainee should be assessed to ensure that they have achieved the required standards and are aware of the risks associated with lift truck operations.

Satisfactory completion of basic training does not provide competence to operate forklift trucks unless and until the specific job training and familiarisation training are also successfully completed.

To ensure consistent standards, both in quality and content, UKMHA recommends that basic training should be provided by an accredited training provider.

Specific job training Specific job training will normally follow the completion of basic training, although it might sometimes be combined or integrated with it. It should be tailored to the specific equipment, loads, operations and site conditions where the trainee will work, and should include: •

- Operation and control of the specific forklift truck and attachments to be used.

- Routine inspection and maintenance to be carried out by the operator.

- The actual operating environment, including, for example, gangways, loading bays, racking, automatic doors; cold stores; slopes; other vehicles; and bad weather.

- Site rules, such as one-way systems, speed limits, general emergency procedures, etc.

- Specific hazards, for example pedestrian crossing points, excavations and overhead obstructions or power lines.

- Training in the actual work to be carried out, for example, loading particular types of vehicle, handling loads and materials normally found at that workplace, including assessing weight.

- Safe systems of work, including refuelling, use of operator restraints and leaving vehicles safe and secure. When the work circumstances change, for instance, by introduction of a new load, process or attachment, additional specific job training must be provided.

Familiarisation training A period of familiarisation training, carried out on the job and under close supervision, must take place after satisfactory completion of the specific job training.

MONITORING & ASSESSMENT

Employers should have routine monitoring and assessment processes to ensure that refresher training and retesting is promptly implemented as required. Monitoring should check for any developing unsafe working practices, changes in working practices or environment, and accidents and near-misses. Assessments should be carried out by a suitably competent person to determine whether refresher training is required.

REFRESHER TRAINING

Refresher training is legally required and can be the best way to make sure employees stay competent. There is no defined time period after which an employer must provide refresher training; it should be in line with company policies following the completion of a risk assessment, but the accredited training establishment providing the initial training should be able to assist with this. A common interval for refresher training is 3 years, however, this will depend on the specific circumstances and will need to be reduced if performance monitoring indicates a requirement. Refresher training might also be appropriate where the operator has not used trucks for some time.

What subjects must be covered? Powered industrial truck operator trainees must be trained in the following topics unless the employer can demonstrate that some of the topics are not needed for safe operation.

(I) Truck-related topics.

A) All operating instructions, warnings and precautions for the types of truck the operator will be authorized to operate;

(B) Similarities to and differences from the automobile;

(C) Controls and instrumentation: location, what they do, and how they work;

(D) Power plant operation and maintenance;

(E) Steering and manoeuvring;

(F) Visibility (including restrictions due to loading);

(G) Fork and attachment adaptation, operation and limitations of their utilization;

(H) Vehicle capacity;

(I) Vehicle stability;

(J) Vehicle inspection and maintenance;

(K) Refueling or charging, recharging batteries;

(L) Operating limitations;

(M) Any other operating instruction, warning or precaution listed in the operator's manual for the type vehicle that the employee is being trained to operate.

BLOCK SYLLABUS:

- Practical Training
- Introduction to the lift truck to be used for training, controls and instruments
- Lift truck pre-use checks
- Correct procedures for mounting/dismounting
- Start, moving, stopping and steering the lift truck in an open space
- Start, moving, stopping and steering the lift truck in restricted space
- Operation of the hydraulic controls
- Weight assessment and lift truck stability
- Handling unladen pallets and laden loads
- Stacking/de-stacking procedures
- Negotiation through the chicane forks leading / trailing unladen / laden
- Driving on/off ramps and inclines only if this additional training is booked
- Road vehicle loading/unloading procedures
- Refuelling procedures

“Basic Operating Skills Test”

- Practical test of basic operating skills
- Practical test of ability to carry out a lift truck pre-use check
- Associated knowledge.

Training Course Closure

- · Completion of forklift training course critique.
- · Complete course members individual ‘Record of Forklift Training’
- · Announcement of results testing.
- · Outline of certification procedures
- · Obtaining course member’s views on forklift training course

