



## NFSD 2024 – Restart – Refresher training

A key theme of this year's National Forklift Safety Day campaign is the importance of operator training. Ensuring that your team possess and retain the right skills, knowledge and understanding is key for fostering a safe, legally compliant workplace.

In this document, we will examine the statutory requirements for refresher training, when refresher training is required and the need for keeping training records.

### What is refresher training and what does the law and the HSE say about it

The HSE require that "Lift-truck operators, even those who are trained and experienced, need to be routinely monitored in the workplace and, where necessary, retested or refresher trained to make sure they continue to operate lift trucks safely" (L117, para 75).

They recommend regular refresher training to make sure that operators:

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

The Management of Health and Safety at Work Regulations 1999 require that employers not only provide adequate training, but also that this shall be:

- Repeated periodically, and,
- Adapted to take account of new or changed risks





## When is refresher training required

### 1. Periodic refresher training

Whilst there is a legal obligation to provide refresher training, the maximum interval by which it must be provided is not specified in the legislation.

UKMHA strongly recommends that operator training be provided by a training establishment accredited by a member of [The Accrediting Bodies Association for Workplace Transport \(ABA\)](#). The training provider should be able to advise on an appropriate interval suitable for individual sites and applications, however, this is commonly 3-5 years.

### 2. Monitoring and assessment

Irrespective of periodic refresher training employers are obliged to monitor and assess workplace performance.

Workplace monitoring may be announced or unannounced, or a mixture of both, but employees should be informed and consulted about the procedures in place.

*The Provision and Use of Work Equipment Regulations 1998 (PUWER)* require that employers provide adequate training to managers and supervisors to ensure the safe use of work equipment and to recognise unsafe practices and behaviour.

Where unsafe working practices appear to have developed supervisors should immediately intervene and should consider whether refresher training or operator retesting is required.





### 3. Incidents and accidents

Incidents, accidents and near misses may indicate that refresher training is required. However, a 'knee jerk' response that such events necessarily indicate operator error should be avoided and the root cause determined and addressed.



In addition to considering operator skill, factors such as working practices (e.g. lifting plan and workplace transport plan), workplace pressures and environment, suitability of workplace equipment, co-worker training, and staff fatigue should be reviewed as part of a process of updating the workplace risk assessments.

Retesting by a suitably competent person, such as an instructor, can determine whether retraining the operator is the appropriate and adequate response.

### Training records

Employers are required to keep adequate records of the training provided to each employee and the equipment they are authorised to operate.

The training records should identify the basic training, specific job training and familiarisation training provided for each equipment type, along with evidence, such as certificates or test results, and details of testing and refresher training.

Appendix 3 of HSE ACOP L117 provides an example of an employer's training record.

### Further information

#### UKMHA Fact Sheets

[FS2 How long does a fork lift truck licence](#)

[FS19 Medical standards for fork lift truck operators](#)

[FS23 Fork lift truck operator training](#)

[FS24 Supervision of fork lift truck operations](#)

# NATIONAL **FORKLIFT** **SAFETY DAY**



## **Standards**

[BS ISO 21262:2020, Industrial trucks — Safety rules for application, operation and maintenance](#)

## **HSE Guidance**

[HSE ACOP L117, Rider-operated lift trucks Operator training and safe use](#)

[HSE INDG345, Health and safety training: A brief guide](#)

[HSE webpage “refresher training”](#)

## **Legislation**

[The Provision and Use of Work Equipment Regulations 1998 \(PUWER\)](#)

[The Management of Health and Safety at Work Regulations 1999](#)

