

Industrial Trucks Training Checklist

Prepare for National Forklift Safety Day with This Training Checklist

As the UK's leading trade association for the material handling sector, the UKMHA is dedicated to helping members and non-members uphold the highest safety standards. This year, our National Forklift Safety Day campaign focuses on what to do in the event of an incident, backed by the slogan "Prevent - Manage - Learn".

NFSD is an ideal opportunity for us to remind ourselves of the importance of effective training. This is both a legal requirement and an essential element of workplace safety.

The following training checklist is designed to help business ensure that adequate training has been provided to all staff involved with material handling equipment in the workplace.

Checklists to assess compliance with both The Provision and Use of Workplace Equipment Regulations 1998 and The Lifting Operations and Lifting Equipment Regulations 1998 are also available as part of our 2024 NFSD Campaign, and Safe User Group members can also access our complete range of compliance checklists and Health and Safety Manual guidance in the members area of the UKMHA website.

For more information about SUG membership please visit <https://ukmha.org.uk/safe-user-group/>

USING THE CHECKLIST

In the COMPLIANCE columns, indicate the stage of compliance found by placing a tick as appropriate in the YES, NO, RW (*Requires Work*) and N/A (*Not Applicable*) columns.

The 'RW' column further explained; Often, something will have been done but this will be judged insufficient to ensure compliance. In that case, a tick in the RW (*Requires Work*) column indicates that work needs to be done to improve, review or update as appropriate.

In the ACTION columns, space is given to allow a person to be nominated to take the required action, and for a target date to be allocated for the work to be completed.

The COMMENTS column can be used to prioritise the actions, comment on the work to be done, note progress or make a cross reference as necessary.

FURTHER INFORMATION

HSE L117, Approved Code of Practice and Guidance: Rider-operated lift trucks – Operator training and safe use <https://www.hse.gov.uk/pubns/priced/l117.pdf>

HSE HSG136, A guide to workplace transport safety <https://www.hse.gov.uk/pubns/priced/hsg136.pdf>

UKMHA FS6, Fork lift operator training – recognised accrediting bodies

UKMHA FS9, Training requirements for hand pallet trucks

UKMHA FS12, The legal requirements for fork lift truck operator refresher training

UKMHA FS23, Fork lift truck operator training

UKMHA FS24, Supervision of fork lift truck operations

ABAWT Workplace Transport Groupings <https://abawt.co.uk/wp-content/uploads/2022/11/aba-workplace-transport-groupings-v9.pdf>

BS ISO 21262:2020, Industrial trucks — Safety rules for application, operation and maintenance <https://knowledge.bsigroup.com/products/industrial-trucks-safety-rules-for-application-operation-and-maintenance?version=standard>

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Section 1 - Supervisors

Check Questions	Compliance				Action		Comments
	Yes	No	RW	N/A	By Whom	Target Date	
Have all supervisors received adequate training information on all work equipment? This should include methods of use, risks, precautions and interventions.							
Does the training cover the authorisation of operators and record keeping?							
Have all supervisors received sufficient training to identify and monitor safe and unsafe practices?							
Has the training covered the key topics below? <ul style="list-style-type: none"> • Control of equipment • Daily checks, such as fuelling and charging, maintenance and thorough examination • Loading and unloading operations • Special lifting operations, including damaged loads • Incident response, including rescue of persons • Limitations to use • Segregation of persons from machinery • Operator restraints, e.g. seat belts 							

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Section 2 - Operators

Check Questions	Compliance				Action		Comments
	Yes	No	RW	N/A	By Whom	Target Date	
Has the operator's suitability for the role been adequately assessed?							
BASIC TRAINING Have the operator's basic skills and knowledge been assessed by a qualified instructor for all of the applicable equipment groups in accordance with accredited standards? e.g. B1, B2 and handling attachments							
SPECIFIC JOB TRAINING <ul style="list-style-type: none"> • Actual make and model of the truck and every attachment • Use of safety devices and protective equipment • Fuelling and charging • Routine checks and maintenance • Site conditions, including varying lighting and weather conditions • Load handling and assessment of the specific loads and load locations • Safe systems of work, including custody of keys • Emergency procedures 							
FAMILIARISATION TRAINING Has 'on the job' training under close supervision been sufficient to ensure safe operation?							

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Section 2 – Operators, *continued*

Check Questions	Compliance				Action		Comments
	Yes	No	RW	N/A	By Whom	Target Date	
Has a process for monitoring and assessing operators been established?							
Is refresher training with a defined schedule provided when required?							
<p>Are written training records and authorisations complete and up to date?</p> <p>Note 1: HSE L117 Appendix 3 provides an example of an employer's training record.</p> <p>Note 2: introduction of new equipment or loads requires additional training which must be recorded.</p>							

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Section 3 – Co-Workers & Visitors

Check Questions	Compliance				Action		Comments
	Yes	No	RW	N/A	By Whom	Target Date	
Has workplace transport awareness training been provided?							
Has the necessary PPE been provided?							
Has a detailed explanation of the various site rules been provided?							
Have co-workers involved in loading and unloading operations received training on safe working procedures?							
Is incident response training provided?							