

UKMHA

When a Technician Visits a site

Checksheet

With around half a million forklift trucks and an estimated 5,000 mobile technicians active in the UK. It is a common oversight and misconception that there is no legislation governing the on-site maintenance and repair of FLT operations conducted by visiting workers.

Time is a valuable commodity for all modern businesses — particularly for service providers, where the demand for maximum uptime, lean and efficient service delivery is constant. However, **did you know over 30% of Service Technician Lost Time Accidents occur before work on the machine has even begun....** think about that for a moment, and then hopefully we can all agree that just those few extra essential minutes at the outset can significantly improve safety for everyone involved.

Customer protocols cover a diverse spectrum of requirements across multiple industrial applications, and it is beyond the scope of this check sheet to cover every possible scenario. However, by following key fundamental steps, we can collectively work towards safer working practices and better outcomes for every activity.

We should always remember that the principle of a shared duty of care exists and can be simply visualised as follows.



What the law requires:

The **Health and Safety at Work etc. Act 1974 (HSWA) Section 3(1)** requires employers to conduct their undertaking in such a way as to ensure that persons not in their employment are not exposed to risks to their health or safety.

The **Management of Health and Safety at Work Regulations 1999** Regulation 3 requires employers to undertake a suitable and sufficient assessment of the risks to persons not in their employment arising from activities at the site. Regulation 7 emphasises the need for cooperation, coordination, and exchange of relevant risk information between the employer operating the site and that of the visiting technician. And Regulation 12 requires persons hosting employees from an outside undertaking to provide information on the hazards present and processes and procedures for mitigating the associated risk.

Further information

[UKMHA Safe Working Area Charter](#)

[HSE INDG368 Using Contractors: A brief guide](#)

[HSE HSG159 Managing Contractors: A guide for employers](#)

[UKMHA GN49. Engineers working at heights](#)

When a Service Technician Visits Site (click checkbox to tick)			
Customer Checks		Mobile Technician Checks	
Is the appointment expected?		On arrival, contact the responsible customer representative?	
Do you need to establish compliance and competency before the technician attends site?		Do you fully understand the scope of the visit?	
Is an induction required?		Do you need an induction?	
Have all the relevant site hazards been made clear to the visiting technician?		Are you aware of all relevant site related hazards?	
Are the welfare arrangements clear?		Do you have access to appropriate welfare facilities?	
Have parking arrangements been made clear?		Can you park your van in an agreed and realistic location?	
Have you specified the site PPE requirements?		Do you know what PPE you are required to use for both customer and activity?	
Have you clarified the site-specific emergency procedures and contacts?		Are you familiar with on-site emergency procedures? (Fire, First Aid etc).	
Agree the scope of work.		Have you discussed the planned activity with the customer?	
		Do you have the necessary correct tools and equipment for the intended task?	
		Do you have the correct level of technical competency to undertake the activity safely, and to the appropriate technical specifications?	
Are there activities requiring specific controls / authorisations? (e.g. Working at Height, Hot Work etc).		Will you be carrying out any high-risk activities, (e.g. working at height or hot work), if so, have you agreed these with the customer?	
Is a permit to work required?		Do you need a permit to work?	
Has a safe working area been allocated and agreed?		Do you have a safe working area?	
Is the boundary of the safe working area clear to everyone on site?		Has the boundary of the safe working area been cordoned off / is clear to everyone on site?	
Is a point of work risk assessment required?		Have you carried out a point of work risk assessment?	
If the work involves moving MHE, or parts, or any other machinery or equipment. Then are responsibility and competence for the task agreed and are the traffic routes and procedures clearly defined?		Have the movement of machinery, equipment and materials been discussed and agreed?	
Are there any lone working considerations?		Will you be lone working? If so, have you established monitoring controls with your employer and the customer?	
Does the work require isolation or lock-off of any machinery or services?		Do you clearly understand the lock-off and system isolation procedures?	
Are there any site-specific protocols for the processing of hazardous waste that may be produced in the course of the undertaking?		Are you clear on how hazardous waste, such as oily rags, is to be disposed of?	
Are the handover expectations clear on completion of work?		On completion of the work, have you completed the appropriate documentation, obtained a customer signature, and if appropriate, handed the machine's keys to a responsible person?	
		Is the work area left in a clean and safe condition with any relevant waste removed from site?	
		Have you notified your employer that the visit is complete, and you are departing from the customer site?	