

## Operator training of forklift truck engineers, sales personnel etc

### Note:

If you are a fork lift truck engineer, transport operative (e.g. HGV driver), or a sales demonstrator who operates material handling equipment (MHE), or are responsible for such personnel. You should, in the first instance, read **UKMHA Guidance Note GN71**, Operator training for forklift technicians and others for restricted use, as it contains the most relevant content.

However, if you are responsible for any of the above contractors visiting your site/premises, then you are responsible for providing them with a safe working environment, as detailed in the **UKMHA Safe Working Charter**. Also, you should take sufficient steps to ensure that contractors are competent to operate equipment on your site before authorising them to do so, as described below.

If you are responsible for operators of MHE, who are employed by you or your organisation, in the first instance, HSE **ACOP L117** should be consulted, which is complimented by the following UKMHA Fact sheets: FS01, FS02, FS06, FS09, FS12, FS16, FS19, FS23, F24 and FS28, which are available on the Association's website [here](#).

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## Legal Requirement

**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.**

Employers have a legal obligation to ensure that all forklift truck (FLT) operators, including FLT engineers, sales personnel and FLT delivery drivers (e.g. HGV drivers), are adequately trained and competent before authorising them to operate MHE on the sites they control.

For specialist visitors to site, such as FLT engineers, the normal training requirements for full FLT operators may not be appropriate. This topic is dealt with in detail in UKMHA Guidance Note GN71, which provides a process whereby suppliers can demonstrate the competence of their staff to customer sites, for limited operations, e.g. moving and testing, for a limited and specified range of equipment.

### **Section 9 of the GN71 covers Authorisation, and is quoted here in full as follows:**

*“Authorisation to operate a truck on a remote site requires co-ordination and agreement between the employer of the visiting worker and the remote site’s management.*

*Prior to commencement of work the authorised site representative should authorise any visitors to operate specified equipment in an agreed manner. Such operation cannot include full normal functionality, such as stacking or tiering loads, unless full training in accordance with HSE ACOP L117 is completed.*

*Note: The term “authorised site representative” refers to a suitably responsible employee of the site who has been delegated the authority to permit and oversee visiting workers’ activities. This may include the site manager, health and safety manager, supervisor, duty holder, or any other member of the site’s management team who has been formally assigned this responsibility.*

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### Legal Requirement (Continued)

*The employer should provide sufficient evidence that their employee is suitably competent to operate the specific equipment for the restricted functionality that shall be agreed. An example of the evidence that can be provided is given in section 13, template certificate of competence.*

*Note: The template certificate of competence is one possible method available for the employer to demonstrate a specified level of competence to a site. It is intended to be completed by the employer. It is not equivalent to the certificate of basic training provided to employers by accredited training providers.*

*The authorised site representative shall ensure that a suitable site induction and safe working area is provided, and that the truck is correctly identified and presented.*

*The authorised site representative is responsible for authorising all machine operation on that site. No person shall operate any machinery on any site without the permission of the authorised site representative.*

*This guidance is intended to provide a method to demonstrate to the authorised site representative that a visiting worker is competent for a limited and specific set of tasks, however, they are within their rights to require additional or different evidence before authorising any activity."*

### Relevant Legislation

Employers are to comply with:

#### **The Provision and Use of Work Equipment Regulations 1998 (PUWER)**

Regulation 9 states that, every employer shall ensure that all persons who use work equipment (including FLT) 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.

#### **Health and Safety at Work etc. Act 1974**

Under Section 2, employers have a general duty 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)**

These regulations address hazards associated with lifting equipment, including FLT and lifting operations. If you provide lifting equipment for use at work, or you have control of the use of lifting equipment, you should ensure that every lifting operation involving a lift truck is:

- Properly planned by a competent person. This is usually the operator for most FLT 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)**

These regulations place additional duties on employers to provide appropriate training.

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### Approved code of practice

The Health and Safety Executive's (HSE) Approved Code of Practice (ACOP) and guidance **L117** **Rider-operated Lift Trucks** relates to rider-operated 'stacking' FLT's. 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.

All FLT operator training is to be consistent with the standards outlined in ACOP L117.

### UKMHA further guidance

For information related to technicians working on user sites, see:

- **UKMHA Guidance Note GN71**
- **UKMHA Safe Working Charter**

For information about forklift truck operators in general, see:

- UKMHA **Fact Sheet FS01**, Minimum age for operating FLT's
- UKMHA **Fact Sheet FS02**, How long does an FLT Driver's Licence last
- UKMHA **Fact Sheet FS06**, FLT operator training – recognised accrediting bodies
- UKMHA **Fact Sheet FS09**, Training requirements for hand pallet trucks
- UKMHA **Fact Sheet FS12**, Legal requirement for FLT Operator Refresher Training
- UKMHA **Fact Sheet FS16**, Overseas FLT Operator Licences

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