



# A GUIDE TO COMPLIANT LIFT TRUCK TRAINING

The aim of lift truck operator training is to develop safe and skilled operators to help minimise the risk of incidents, and improve efficiency in the workplace. A positive consequence of effective operator training is a reduction in operating costs.

Poor operation leads to incidents. At best, incidents damage stock, infrastructure and equipment and result in down time. At worst, they injure or even kill people.

## TOP TIP!

Select the right operators for the role. Consider:

- Physical Ability • Mental Fitness
- Attitude • Reliability

## THERE ARE 3 STAGES

### Basic Operator Training

Basic Operator Training must take place 'off the job'. It covers the practical skills and knowledge required to operate safely. The knowledge part of this training can be delivered as eLearning or in a classroom.

Training includes awareness of risks and hazards, simple manoeuvring, basic hydraulic controls, basic routine maintenance and pre-use inspection.

Basic Operator Training concludes with the Basic Operating Skills Test. Passing this test is not enough to say an operator is safe to begin work. The further 2 stages of training must be completed and documented first.

There is no legal requirement to issue certificates of Basic Training, but they provide evidence that operators have received relevant training and passed the Basic Operating Skills Test.

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### Specific Job Training

Specific Job Training must take place 'off the job' at the employer's premises. This is where context is added to the basic skills learnt in the first stage of training. The operator learns about the make and model of truck they will be using in their job.

The operator will also learn about work conditions, for example, confined areas, the racking system or cold stores. Importantly, the operator will be instructed on site rules such as speed limits, pedestrian areas, traffic flow and Personal Protective Equipment (PPE).

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### Familiarisation Training

This stage introduces the operator to the 'live work' environment for the first time. This stage takes place 'on the job' under close supervision. This is where the skills and knowledge that have been gained over the first two stages of training are put to use in the workplace. The operator starts with simple tasks and builds towards more complex procedures, allowing them to develop their skills and build their confidence.

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[LEARN MORE ABOUT THE 3 STAGES OF OPERATOR TRAINING →](#)



## ISSUING THE AUTHORISATION TO OPERATE

Once all 3 stages are successfully completed and documented, an operator should be issued with an **Authorisation to Operate** on the premises they work for. All authorisations should be logged and recorded and include:

- Operator's name
- Date authorisation granted and expiry date
- Types/categories of equipment operator is authorised to use
- Any special limitations or conditions associated with the authorisation
- The areas of the company's premises in which the operator is authorised to operate

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### TOP TIP!

Employers - remember to document the details and completion of the 3 stages of training in your employee records.

## MANAGING THE OPERATOR

### Monitoring & Supervision

MHE supervisors/managers play a vital role in the post-training phase of a lift truck operator's career. Part of their role is to enforce the best practice and skills learnt.

To supervise/manage lift truck operations, you do not need to be a qualified lift truck operator but you are legally required by PUWER (Provision and Use of Work Equipment Regulations) to receive training that enables you to understand potential risks posed by the equipment, and how to avoid or prevent them. Training is available as eLearning or as classroom based training.

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### Conversion Training

Conversion training should be provided to qualified operators preparing to migrate from one particular type of material handling equipment to another.



This migration could be from one category of truck to another, for example a counterbalance to a reach truck, or from a smaller truck to a bigger truck of the same type.

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### Refresher Training

Refresher training should be carried out every three to five years. Refresher training enables employers to go over any areas of concern, revisit best practice, and feel confident in the safety, efficiency, and compliance of the operation.

There are important exceptions to the 'three to five year' period such as after a period of absence or for occasional users, who perhaps do not routinely use equipment. These employees should receive refresher training before they operate the equipment.

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