

SAFE USE OF

# RIDER OPERATED LIFT TRUCKS

APPROVED CODE OF PRACTICE

Health and Safety at Work (Jersey) Law, 1989





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**RIDER OPERATED  
LIFT TRUCKS**  
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## Notice of Approval

This Approved Code of Practice, ACoP 6, entitled “Safe use of rider operated lift trucks” has been approved by the States of Jersey Minister for Social Security under Article 10 of the Health and Safety at Work (Jersey) Law, 1989, (the HSW Law).

This Code replaces the previous edition of the ‘Safe use of rider operated lift trucks: Approved Code of Practice’, ACoP 6.

The Code provides practical guidance for all persons who have duties under Part 2 of the HSW Law and are involved with rider operated lift truck operations.

### **ACoP 6 (rev 2022)**

This Code of Practice shall come into force on 1 November 2022



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6 September 2022

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# Contents

## 01

Pages 12-17

## 02

Pages 20-29

### Safe workplace

Pedestrians	12
Vehicle Marshal (Banksmen)	13
Members of the public	13
Lift truck operating areas	13
Lift truck traffic routes	14
Lighting conditions	15
Adequate ventilation	15
Parking areas	15
Battery charging and refuelling	16
Using lift trucks in potentially explosive atmospheres	16

### Safe vehicle

#### Design and assembly

Identification plate	20
Capacity plate	20
Accessories used with lift trucks	21
Attachments	21
Restraining systems and protective structures	22
Load backrest extensions	22
Protection from the weather	23
Wheels and tyres	23
Brakes	24
Lights	24
Visibility	24
Noise	25
Seat design and vibration	25
Lift trucks powered by internal combustion engines	25
Lift truck stability	26
Counterbalanced trucks	26
Telescopic material handler (telehandlers)	26

#### Maintenance, inspection, and thorough examination

Daily checks	28
Planned routine servicing and maintenance	29
Thorough examination	29

# 03

Pages 32-41

# 04

Pages 44-45

## Safe worker

Competence	32
Selecting operators and trainees	32
Medical Considerations	33
Operators whose first language is not English or have low literacy skills	34

## Training requirements

Authorisation of lift truck operators	35
Basic training	35
Specific job training	36
Familiarisation training	37
Assessment of experienced operators	37
Conversion training	37
Refresher training	38
Monitoring and supervision	38
Competence records	39
Visiting operators and drivers	39
Agency workers and contractors	40
Using lift trucks on the public road	40

## Working platforms on lift trucks

Lift truck and platform compatibility	45
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## Appendices

<b>Appendix 1</b> Example format of an operator's certificate of competence	48
<b>Appendix 2</b> Example format for an operator's training record	49
<b>Appendix 3</b> Certificate of Exemption No. 6587/1	51
<b>Appendix 4</b> Useful Contacts	52

# Preface

Every year, in Jersey and the UK, activities involving the use of rider operated lift trucks cause serious and, on occasion, fatal accidents.

By the nature of the work activity rider operated lift truck operators carry out high risk work, often in unfamiliar and changing environments and without direct supervision. There must therefore be an effective set of controls in place to assess, control and manage rider operated lift truck operations to ensure the safety of all involved.

This Approved Code of Practice (ACoP) is intended to provide practical guidance on how to address the well-recognised dangers associated with the use of rider operated lift trucks. It also sets out the standards relating to the inspection, examination and maintenance of rider operated lift trucks and lifting equipment, and the training and assessment of competence of operators.

The ACoP is based on, and brings together, authoritative guidance published by the Jersey Health and Safety Inspectorate (HSI), the UK Health and Safety Executive (HSE), Jersey Driver & Vehicle Standards (DVS) and representative industry bodies such as the 'Forklift Truck Association (FLTA).

## Who should read this ACoP?

ACoP 6 is aimed at anyone with responsibility for the safe operation of rider operated lift trucks. This includes employers, employees, operators, training providers, suppliers such as hire companies and maintenance staff who operate rider operated lift trucks, as well as those in control of workplaces where such operations take place, including construction sites.

This document may also be of interest to others such as designers/manufacturers and health and safety representatives.

# The Law

Employers have a duty under the health and safety law to ensure, so far as is reasonably practicable, the health, safety and welfare of their employees and others who may be affected by their undertaking. The main legislation applying to rider operated lift trucks is:

- The Health and Safety at Work (Jersey) Law, 1989
- Health and Safety (Management in Construction) (Jersey) Regulations, 2016
- The Cranes and Lifting Appliances (Jersey) Regulations, 1978
- The Chains, Ropes and Lifting Gear (Jersey) Regulations, 1979

## Legal status of an ACoP

An ACoP has a special legal status. It provides practical guidance on how to comply with the general duties imposed by the Health and Safety at Work (Jersey) Law 1989 (the HSW Law). If the guidance is followed, this would be sufficient to demonstrate compliance with the Law in respect of those specific matters to which the ACoP refers.

Alternative methods to those set out in the ACoP may be used in order to comply with the HSW Law, however, if it is proved, during a prosecution for a breach of the Law, that the relevant provisions of the ACoP have not been followed, the defendant will need to show that they have complied with the HSW Law in some other way, or a court will find them at fault.

## What is covered?

The ACoP covers stacking rider operated lift trucks, including articulated steering truck types. 'Rider operated' means any truck capable of carrying an operator and includes trucks controlled from both seated and stand-on positions, which may be fixed or fold-away. The purpose of this coverage is to include all types of lift truck having similar training requirements and to which the advice can reasonably be applied. For ease of simplicity all further references to 'lift truck' in the ACoP should be read as meaning a 'rider operated lift truck'.

Pedestrian-operated lift trucks and stand-on pallet trucks that do not lift materials for stacking are not covered by this ACoP, however are still subject to the requirements under the HSW Law. Straddle carriers and non-lift trucks fitted with removable attachments which modify their function, allowing them to be used temporarily as lift trucks, for example agricultural tractors with fork-lift attachments, are also not included. Operators of all such machines must still be adequately trained and provided with a safe system of work in their use, including any attachments.

Examples of common lift trucks in use are illustrated below.



**Fig. 1 Counterbalance lift truck**



**Fig. 2 Industrial reach truck**



**Fig. 3 Rough terrain lift truck**



**Fig. 4 Telescopic materials handler (telehandler)**



**Fig. 5 Side loading lift truck**



**Fig. 6 Large capacity lift truck**

# Introduction

Lift trucks are used widely throughout industry for moving materials and goods. Activities involving the use of lift trucks result in a number of serious injuries in the Island every year. Even when an incident does not cause injury, it can still mean costly damage to lift trucks, buildings, fittings, and goods, as well as disrupting the work.

The key dangers involved with lift truck operations include:

- Vehicle overturns
- Collisions between the lift truck and pedestrians, other vehicles, or structures
- Failure of safety critical components
- Unstable or unsafe load

Both the lift truck operator and other people in the vicinity are at risk of injury in the event of something going wrong. There are a few simple measures which can be taken to prevent accidents, including:

- Assessing and controlling the significant risks associated with lift truck operations
- Managing lift truck operations using safe systems of work
- Making sure lift truck operations are carried out by trained and competent operators, and are adequately supervised
- Making sure lift trucks and any attachments are maintained in a good condition
- Using suitable equipment/ accessories for the work to be carried out

In basic terms, the safe operation of lift trucks involves a combination of:

- A safe workplace (in terms of design and activities carried out)
- A safe vehicle
- A safe worker

Parts 1 to 3 of the ACoP cover these three broad areas. Whilst lift trucks are primarily intended for lifting materials not people, lift trucks can be used with working platforms to lift people to carry out certain planned work at height. Working platforms on lift trucks will not provide the same level of safety as purpose-built equipment such as a mobile elevated work

platform (MEWP), so where it is reasonably practicable to obtain and use purpose-built equipment for lifting people, then such equipment should be used. Specific guidance for working platforms on lift trucks is set out in Part 4 of the ACoP.

**Fig. 7 Identifies the main component parts of a typical counterbalance lift truck**





# 01

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## Safe workplace

- Pedestrians
- Vehicle Marshal (Banksmen)
- Members of the public
- Lift truck operating areas
- Lift truck traffic routes
- Lighting conditions
- Adequate ventilation
- Parking areas
- Battery charging and refuelling
- Using lift trucks in potentially explosive atmospheres

**1** Every person in control of a workplace where a lift truck is used shall ensure that all lift truck operating areas are suitably designed and maintained to ensure the safety of all those that could be put at risk, including the lift truck operator and any other people present in the workplace.

**2** Wherever possible, persons not involved with the lift truck operations should be excluded from the operating area.

## **Pedestrians**

**3** Where possible, prohibit pedestrians from areas where lift trucks are operating. If this is not possible, assess the risks to pedestrians and, where necessary, provide ways to adequately control the risks. For example:

- Separate, so far as is reasonably practicable, pedestrian activities from areas where lift trucks are operating, using a physical barrier wherever possible
- Define, designate, and clearly mark pedestrian routes and crossing places
- Provide sufficient clear warning signs to inform people that trucks operate in the premises or area
- Instructing lift-truck operators to sound horns at appropriate locations, such as before corners

**4** Other measures that could be considered include:

- Use of audible warning devices, for example automatic reversing beepers
- Use of visible warning such as flashing beacons
- Use of lift truck perimeter line safety zone warning lights
- Fitting of visibility aids, for example convex mirrors or CCTV
- Wearing of high-visibility clothing for pedestrians where the risks to their safety cannot be adequately controlled by other methods. Lift-truck operators should wear such clothing whenever they are operating the lift truck
- Fitting of presence-sensing equipment which sounds a warning when an object or person is detected, or automatically stops the truck to prevent a collision

## Vehicle Marshal (Banksmen)

- 5** The use of a banksman should only be considered when there is no other way to control reversing risks or carrying out any manoeuvres with restricted visibility. The role inherently requires the banksman to stand close to where a lift truck is manoeuvring, which can put them at risk. If a banksman is necessary, they must always be visible to operators, in a safe position and able to communicate with, and give clear instructions to, the operator using recognised signals. Everyone involved in the activity should be trained and competent.

## Members of the public

- 6** The public should not be allowed in lift truck operating areas. If a lift truck needs to enter an area when the public has access, such as during normal opening hours in a retail warehouse, there should be a written safe system of work outlining the precautions, based on risk assessment, for example physically blocking off the area where the lift truck is operating.

## Lift truck operating areas

- 7** All lift truck operating areas should be suitably designed and properly maintained. The surfaces used by lift trucks should be as level and firm as possible, and preferably surfaced with concrete or other suitable material. Some lift trucks are designed to operate on rough or uneven surfaces, but it is important to understand and comply with the manufacturer's operating limitations.

## 8

Every person in control of the workplace must take account of the following:

- Potholes should be repaired and accumulations of loose material on the ground removed as they are particularly hazardous to small-wheeled lift trucks
- Road humps are unsuitable for lift trucks. If they are used to reduce the speed of other traffic, a bypass for lift trucks should be provided
- Gradients should be eliminated where possible. Lift trucks should never be allowed to be driven up or down, or travel or turn across, gradients that exceed the maximum specified by the manufacturer or supplier
- Roads, gangways, and aisles should have sufficient width and overhead clearance for the largest lift truck using them to do so safely, whether loaded or unloaded, and if necessary, to allow other vehicles and loads to pass each other safely. Attention should be given to the risks of contacting hazards, especially overhead power lines
- One-way traffic systems should be introduced wherever possible to reduce the risk of collisions and avoid the need for reversing

### Lift truck traffic routes

## 9

Every person in control of the workplace where a lift truck is used must take account of the following:

- Sharp bends, blind spots, and overhead obstructions should be eliminated where possible. Where they cannot be removed, clearly marked barriers, for example with black and yellow diagonal stripes, should be provided. Any overhead obstructions should be clearly marked
- Where barriers cannot be used, signs, for example instructing operators to restrict speed, warning devices and mirrors should be used
- Obstructions should be removed from the working area wherever possible. Structural features of the building or operating area, such as support columns, racking, pipework or other plant should be identified, protected, for example with adequate impact barriers, and clearly marked, for example by black and yellow diagonal stripes

- The edges of loading bays, excavations, and pits should be clearly marked, for example by black and yellow diagonal stripes. Where possible, barriers around the edges should be provided
- Flexible doors of transparent or translucent material may reduce risks where vehicles must pass through. The lift truck operator should have a clear view through the closed doors before proceeding
- On construction sites steps should be taken to identify unloading areas, appropriately designed scaffold loading bays and routes between them. Particular attention should be given to making sure suitable ground conditions are maintained wherever the lift truck is required to operate

## Lighting conditions

### 10

Traffic routes used by lift trucks should be adequately lit in a manner to avoid glare at junctions and crossing points, near buildings and plant, at stacking/de-stacking areas and in areas shared with other drivers or pedestrians. Lighting should be arranged to avoid sudden changes of lighting levels, for example where drivers may pass from bright sunlight into a building.

## Adequate ventilation

### 11

Do not use lift trucks with internal combustion engines in confined spaces or where there is inadequate ventilation. Adequate ventilation must be provided to ensure people are not exposed to exhaust fumes from any truck with an internal combustion engine.

## Parking areas

### 12

Adequate parking areas for all lift trucks should be provided. As far as possible, lift trucks should be isolated and parked in a secure compound or supervised area where they will not be easily accessible to unauthorised people, and preferably separate from main thoroughfares and operating areas.

## Battery charging and refuelling

- 13** Appropriate areas should be allocated for the refuelling, or battery recharging, of trucks.

## Battery recharging

- 14** When batteries are being recharged potentially explosive hydrogen gas is produced, so the area must be well ventilated and sources of ignition, including smoking, excluded from the area. Appropriate warning signage should be posted and the manufacturers procedures for battery charging followed, including the wearing of appropriate personal protective equipment.

## Refuelling

- 15** Refuelling of diesel, petrol, or liquefied petroleum gas (LPG) powered lift trucks should only be undertaken outdoors, in a safe place away from pits, drains and gulleys and sources of ignition. Appropriate precautions should be taken to reduce the risk of spillage and warning signage posted. Engines should always be switched off before refuelling and appropriate personal protective equipment (PPE) used when handling fuel oils or fuelling the lift truck.

## Using lift trucks in potentially explosive atmospheres

- 16** Lift trucks should not be used in areas where flammable vapour, gases or dusts are liable to be present, unless they have been specifically designed or adapted for such use. If there is any doubt the manufacturer or authorised supplier should be contacted for advice.

# 17

A risk assessment should be carried out to identify and classify areas of the workplace where explosive atmospheres may occur and ignition sources in those areas eliminated. The two main hazards associated with using lift trucks in potentially explosive atmospheres are:

- Direct ignition, for example by hot surfaces, unprotected electrical equipment, or hot sparks from the exhaust
- Flammable vapour being drawn into the engine air intake. If this happens, the engine is liable to accelerate out of control causing overspeeding and possible flashback through the intake to ignite the surrounding, potentially explosive, atmosphere



# 02

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## Safe vehicle

### Design and assembly

- Identification plate
- Capacity plate
- Accessories used with lift trucks
- Attachments
- Restraining systems and protective structures
- Load backrest extensions
- Protection from the weather
- Wheels and tyres
- Brakes
- Lights
- Visibility
- Noise
- Seat design and vibration
- Lift trucks powered by internal combustion engines
- Lift truck stability
- Counterbalanced trucks
- Telescopic material handler (telehandlers)

### Maintenance, inspection, and thorough examination

- Daily checks
- Planned routine servicing and maintenance
- Thorough examination

**18** Fork-lift trucks are a prescribed 'lifting appliance' under the Cranes and Lifting Appliances (Jersey) Regulations, 1978 and subject to a number of requirements in respect of design, construction, assembly, and maintenance under the Regulations.

**19** Chains that form part of the lifting mechanism fall within the definition of 'lifting gear' under the Chains, Ropes and Lifting Gear (Jersey) Regulations, 1979. They must be thoroughly examined by a competent person at least once every 6 months in accordance with Regulation 7 of the Regulations.

**20** Lift trucks can work in harsh environments especially when used outdoors and require effective inspection and maintenance. Both the lift truck and lifting components must be subject to regular checks to ensure they are in good working order and free from faults or damage that could make them unsafe to use.

## Design and assembly

**21** Every lift truck provided for use at work must be suitable for the task and the environment in which it is to be used.

### Identification Plate

**22** An identification plate must be fitted to the lift truck body and include information including a distinguishing number, lift truck weight, fuel type, and overall load capacity.

### Capacity Plate

**23** The safe working load(s) of the lift truck must be prominently affixed to the lift truck. The actual capacity (safe working load) is the maximum load that can be carried at a set distance from the heels of the forks to a specified height. This should be stated on the lift-truck capacity plate or capacity chart. Lift trucks should never be loaded beyond their actual capacity.

## Accessories used with lift trucks

### 24

Some loads can be handled more efficiently and safely by using suitable attachments, for example fork extensions, booms, rotating heads, drum clamps, paper roll clamps, bale clamps, load stabilisers etc. Attachments, including fork extensions, will often affect stability and must not be used without first seeking advice from the supplier or manufacturer of the attachment. Lift truck operators should also have received instruction and training in the safe attachment and use of accessories they are required to use at work.

## Attachments

### 25

Fitting an attachment will require a reduction in the actual capacity of the lift truck, called derating. Only a person with the appropriate knowledge and experience should carry it out, based on information from the manufacturer or supplier about the suitability of an attachment for a particular lift truck and the necessary derating. A new capacity plate relating to the attachment should be fitted to the lift truck before it is used with the attachment. The manufacturer's instructions for using the attachment should be followed at all times.

### 26

Fork extensions are a commonly used attachment to increase the reach of a lift. They should be clearly marked with the manufacturer's mark, serial number, year of manufacture, rated and load centre distance for the fork extension and the required blade cross section and minimum blade length for the parent fork arm. In general terms the forklift extensions should not exceed 1.5 times the length of the fork. In addition to routine visual checks, the fork extensions should be subject to 6 monthly inspection by a competent person.

## Restraining systems and protective structures

**27** Since 2002, counterbalanced trucks, rough-terrain trucks and side-loading lift trucks, one side only, must be fitted with an operator restraining system (for example a seat belt). For older trucks which do not have one, a restraining system should be fitted if the risk assessment indicates that there is a risk of the vehicle overturning and where the operator may be trapped between the truck and the ground. Where restraining systems are fitted, they must be used. Using a green beacon monitoring system which is activated when the seat belt buckle is fastened can help monitor compliance.

**28** Where a restraining system cannot be fitted, and the risks are sufficiently high, the lift truck should not be used. Any lift truck fitted with a roll-over protective structure (ROPS) to protect operators from the risk of injury resulting from 180° or more roll-over should be fitted with a restraining system. When fitted, the restraining system must be used.

**29** A falling object protective structure (FOPS) should be provided where there is a significant risk of falling materials endangering the operator. ROPS and FOPS are designed and manufactured to European Standards to ensure they meet the required performance criteria and should not be modified in any way. The lift truck manufacturer should be consulted if they are damaged to determine whether they need replacing or can be repaired.

## Load backrest extensions

**30** A load backrest extension should be fitted if the lift truck is used to move objects liable to fall on the operator. It should be high enough to prevent the load, or part of the load, rolling over the top of it.

## Protection from the weather

**31**

Where lift trucks are used outside, adequate provision should be made to protect the operator from adverse weather. Where possible, use lift trucks fitted with cabs and wiper systems. Operators should not fit ad-hoc or temporary weather proofing such as boards, shrink-wrap or plastic sheeting to cover the seating position because vision will be reduced, particularly overhead, and/ or the covering may come loose and cause a hazard.

**32**

Lift truck operations should be halted where weather conditions are bad enough to adversely affect the performance of the lift truck or expose the operators to danger, for example excessive winds speed, poor visibility due to mist or fog, lightening or heavy rain. Bad weather, even after it is over, may leave unsafe conditions, for example waterlogged and unstable ground following a period of heavy rain.

## Wheels and tyres

**33**

Wheels for lift trucks vary, depending on how they will be used. They may be one-piece rim, split or divided rim, or multi piece rims with two to five pieces. Tyres may be solid or pneumatic. The tyre construction and material depend on what the lift truck is used for

- Solid tyres are generally fitted to warehouse trucks and trucks used on smooth surfaces. They may be press-on band or snap-in tyres
- Pneumatic tyres are generally fitted to rough-terrain trucks and larger trucks and may be tubed or tubeless. They have considerable stored energy and there have been accidents due to the sudden release of pressure, particularly during inflation

## Brakes

### 34

Lift trucks should have a braking system capable of correctly stopping a laden lift truck smoothly and efficiently and holding the lift truck when parked. The braking system should be properly maintained and tested regularly.

## Lights

### 35

There should be suitable lights at the front and rear of the lift trucks if they have to be operated at night, or in areas with insufficient light, such as between drive-in racking. A flashing warning beacon should be supplied with the machine and typically used whilst the lift truck is operating. A flashing beacon can be particularly effective where lighting is poor or lift trucks are operated intermittently, or where audible devices are likely to be ineffective.

## Visibility

### 36

Lift trucks should provide sufficient visibility for the operator depending upon the environment and loads that are to be handled. An assessment should be made to see if additional visibility aids are required, for example convex mirrors or CCTV. For example, telehandlers have a significant blind spot to the front right-hand side of the vehicle when the boom is raised in certain configurations. Visibility to the rear may also present a significant hazard. Suitable control measures must therefore be put in place to reduce the risk of persons being struck or an alternative vehicle used for the task. Where visibility aids are fitted, their condition and correct setting should be included as part of the daily checks.

## Noise

### 37

Noise levels from the use of the lift truck and any other background noise should be considered. Where necessary, steps should be taken to reduce risk of hearing damage or the operator's concentration being affected. Manufacturers are required to give information on the noise emission of their lift trucks which should form the basis of a Noise Risk Assessment.

## Seat design and vibration

### 38

Many operators have to sit on their lift truck for long periods, so it is important that the design and maintenance of the seat reduces fatigue and discomfort and prevents ill health caused by vibration. Modern lift trucks do not produce much vibration and seats are now ergonomically designed and adjustable. The manufacturer should be contacted for advice if the seat proves to be unreasonably tiring or passes on excessive vibration, as this may be due to damage or a fault, which should be rectified as soon as possible.

## Lift trucks powered by internal combustion engines

### 39

If it is necessary to use a lift truck powered by internal combustion engines (LPG, petrol, or diesel) inside premises it is important that there is adequate ventilation to remove exhaust fumes, and that the engine is properly maintained. The exhaust should be filtered and provided with a catalytic converter to reduce exposure of persons to dangerous exhaust fumes, however, these systems are not a substitute for providing adequate ventilation. Make sure exhaust filters are checked regularly to maintain their effectiveness and carry out monitoring for the presence of gases such as carbon monoxide to establish if there is a problem and to make sure the control measures are adequate.

## Lift truck stability

**40** Lift truck stability (both longitudinal and lateral) can be affected by the load, the task, and the environment where it is operating. Lateral stability is affected by the forces generated, such as when turning or if the truck is tilted sideways by, for example, travelling across an incline or running into a pothole.

## Counterbalanced trucks

**41** A counterbalanced truck can be tipped forward if the load is too heavy or incorrectly placed on the forks; if travelling with the load raised; if the lift truck is accelerated or braked harshly while carrying a heavy load; or it strikes an overhead obstruction.

**42** Counterbalanced trucks are fitted with a counterweight to counteract the weight of the load. The weight of the counterweight must not be altered, unless approved by the manufacturer or supplier, as this will affect the lift truck's stability and safety.

**43** On electric lift trucks, only batteries of the size and weight specified by the lift-truck manufacturer should be used, as they are part of the counterweight.

## Telescopic material handlers (telehandlers)

**44** Telehandlers can raise loads to greater heights and reaches than conventional lift trucks, which increases operating hazards, particularly overturning. Some types have stabilisers or chassis levelling devices. Extending the boom can increase the danger of tipping forwards or sideways and so it should be fully retracted for travelling, except at creep speed (and then only if on relatively hard and level ground). The load capacity of the telehandler will vary according to how far the boom is extended and to what height.

# 45

Telehandlers are fitted with a device which warns of approaching overload (longitudinal load moment indicator (LLMI), or, on newer machines, longitudinal load moment control (LLMC)). These devices must always be switched on when the lift truck is in use and the warnings never ignored. Their calibration should be checked periodically according to the manufacturer's instructions.

## Maintenance, inspection, and thorough examination

# 46

A programme of visual checks, regular inspections, servicing schedules and thorough examination should be established for lift trucks and associated equipment. This should take into account the manufacturer's instructions and statutory requirements under health and safety legislation, including the Cranes and Lifting Appliances (Jersey) Regulations 1978 and Chains, Ropes and Lifting Gear (Jersey) Regulations, 1979.

# 47

Every lift truck should be subject to a formal maintenance programme to ensure it is maintained in a safe condition. A record of all maintenance operations should be kept.

# 48

There should be a documented system for reporting defects and to record that remedial work has been carried out and signed off by a competent person.

## Daily checks

# 49

At the beginning of every shift the operator should check the lift truck to make sure it is in a safe condition. Any defects which may affect its safe operation should be reported to the supervisor and the defect fixed before the lift truck is used. Checks will typically include:

- **Tyres** - check all tyres and look for any visual wear or damage. Pneumatic tyres should be inflated to the correct pressure
- **Fluid levels** - for example, fuel, water, engine and transmissions oils in internal combustion engine lift trucks
- **Batteries** of battery-operated lift trucks are adequately charged and leak free, the charger is switched off, charge lead disconnected and properly stored and the battery retention device is in place
- **Forks** - inspect forks for any sign of damage, particularly cracks on the heels and mounting hooks, bent or damaged fork tips and missing or damaged fork positioning locks
- **Mast** - visually check mast for any wear to lift chains and guides, inspect hydraulic cylinders for any obvious leaks
- **Warning devices** - carry out a functional check of overload warning device, lights, horn and reversing beeper
- **Seating** - check the condition and adjustment of seating
- **Visibility aids** - for example mirrors, CCTV if fitted, functional and adjusted correctly
- **Capacity**- check load-capacity plate is fitted and legible
- **Seatbelt** - if fitted ensure the belt is in good condition, and that it closes, adjusts and releases correctly
- **Controls** - carry out a functional test on systems for lifting, tilting and manipulation, including attachments, to ensure they are working properly
- **Brakes and steering gear** - check brakes, parking brake and steering gear to ensure they are working properly

## Planned routine servicing & maintenance

**50** Regular planned servicing and maintenance programmes, in accordance with the manufacturer's recommendations, will help ensure the lift truck remains in a safe and efficient condition and can identify problems before they become an issue. Such maintenance should only be carried out by competent people.

## Thorough examination

**51** All safety critical parts of the lift truck including the lifting forks, mast, hydraulic cylinders and associated pipework and fittings, should be thoroughly examined by a competent person, such as an insurance engineer surveyor, at least once in every 12 months. If the lift truck or any attachment is used for lifting people, even on an occasional basis, the lift truck must be thoroughly examined at least once every 6 months. The thorough examination is designed to detect any deterioration in sufficient time to allow remedial action to be taken.

**52** Chains that form part of the lifting mechanism fall within the definition of 'lifting gear' under the Chains, Ropes and Lifting Gear (Jersey) Regulations, 1979 and must be thoroughly examined by a competent person at least once every 6 months.



# 03

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## Safe worker

- Competence
- Selecting operators and trainees
- Medical Considerations
- Operators whose first language is not English or have low literacy skills

## Training requirements

- Authorisation of lift truck operators
- Basic training
- Specific job training
- Familiarisation training
- Assessment of experienced operators
- Conversion training
- Refresher training
- Monitoring and supervision
- Competence records
- Visiting operators and drivers
- Agency workers and contractors
- Using lift trucks on the road

**53**

Every employer and self-employed person using a lift truck must take all reasonably practicable steps to ensure that the lift truck and any accessories are only operated by competent operators who have been authorised and suitably trained, or are undergoing a formal training course, for the particular type of lift truck and any accessories being used.

**54**

The operator carrying out lift truck operations also plays a vital part in ensuring the safety, not just of themselves but also other people in the vicinity who may be at risk of serious and potentially fatal injury in the event of something going wrong.

## **Competence**

**55**

Competence is generally described as the combination of training, skills, experience, and knowledge that a person has, and their ability to apply them to a task safely.

**56**

Competence is not, however, an 'absolute' and for any given job there is progression towards greater competence, which develops incrementally throughout the operator's career.

**57**

Initial training will provide a general level of ability to operate the equipment, An operator's experience of working in a particular environment and the range of tasks undertaken will be key factors in determining whether somebody is competent to do a particular job.

## **Selecting operators and trainees**

**58**

Employers should select potential lift truck operators carefully to ensure they have the attributes to be able to operate the lift truck in a responsible manner. They should be:

- Reasonably fit, both physically and mentally, to safely control and operate lift trucks, with the learning ability and potential to become competent operators

- Reliable, with a responsible attitude to their work and health and safety of themselves and others
- Typically, be at least 18 years old, unless they are undergoing a suitable course of training, under direct and constant supervision by a competent person. Children under 16 should never operate lift trucks

**59**

It may be useful to apply a selection test to avoid wasteful attempts to instruct unsuitable trainees. Lift truck training organisations, trade associations and sector skills councils may be able to provide further advice.

## Medical Considerations

**60**

People selected to operate lift trucks should have the necessary level of physical and psychological fitness and learning ability to carry out the task. People with disabilities may be able to work with lift trucks and have developed skills which compensate for their disability.

**61**

Fitness for operating should always be judged on a case-by-case basis. In cases where a disability may potentially have relevance to the safe operation of lift trucks, either to the operator's health and safety or the safety of others who might be affected by them operating lift trucks, competent medical advice should be sought. This should include consideration of competence in an emergency.

**62**

Nobody should be permitted to operate a lift truck whilst unfit because of alcohol or drugs (prescription or recreational).

## Operators whose first language is not English or have low literacy skills

- 63** When employing operators whose first language is not English, or have low literacy or numeracy skills, as well as assessing their skills and knowledge and providing retraining if necessary employers must make sure the operator:
- Has received and understood the information, instruction and training they need to work safely
  - Is adequately supervised and can communicate with their supervisors and others in the vicinity who may be affected

## Training requirements

**64** Every person operating a lift truck must be properly trained, assessed, and authorised as competent to do so. Employers should satisfy themselves that operator training is only carried out by instructors who have themselves undergone appropriate training in instructional techniques and skills' assessment.

**65** There are a number of organisations who provide accreditation for lift truck training schemes. Using an accredited training provider (ATP), who may be an organisation, individual or an in-house training scheme, can provide assurance that the training provided meets the recognised minimum standards of best practice.

**66** Whilst employers may devise and operate their own in-house training and assessment scheme, they must be able to demonstrate that this meets the equivalent standard to that provided by the more formal, independent training courses available.

**67** As basic training is typically carried out in a controlled environment, this training should always be consolidated through structured, on-the-job training

(familiarisation training) to enable the acquisition of the appropriate knowledge and accumulation of relevant operational experience (i.e. competence),

- 68** Training should extend to address not just the technical knowledge and ability required to operate a lift truck, but also the wider safety critical matters such as the assessment of hazards and risks associated with the different environments, e.g., assessment of the ground conditions, type of load, movement, operating in restricted areas, etc.

## Authorisation of lift truck operators

- 69** Employers must not allow an employee to operate a lift truck, even on a very occasional basis, who has not satisfactorily completed basic training and testing in accordance with this ACoP, unless they are undergoing such training under direct and constant supervision, and the employer has or the owner of the lift truck has, certified the operator, in writing, as being competent to operate the lift truck in accordance with Regulation 18 of the Cranes and Lifting Appliances (Jersey) Regulations, 1978. An example of a suggested format for a certificate of competence is shown in Appendix 1.

## Basic training

- 70** Basic training needs to fully cover the skills and knowledge needed to safely operate the type of lift trucks and handling attachments (if any) the trainee will be required to use at work. Basic training for new operatives should be carried out off-the-job. This may be at a suitable training centre or on employer's premises but, where practicable, training areas should be sheltered from adverse weather conditions. A suitable manoeuvring area should be provided, and access restricted to the instructor and trainees whilst training is taking place. A training room or other suitable accommodation should also be made available, together with the appropriate training aids, to enable the instructor to deliver the principles of lift truck operation. If the training is carried out on an employer's premises it should be wholly concerned with training and not form part of any normal commercial operations.

# 71

Training should be largely practical in nature and of sufficient length to enable trainees to acquire the basic skills and knowledge required for safe operation of the lift truck. It should follow a structured, documented training programme which enables the trainee to progressively develop skills in an appropriate sequence, building on what has gone before and allowing sufficient time for learning and practice before the next stage is tackled.

# 72

The instructor should continuously assess a trainee's progress to ensure the required standards are achieved at each stage of basic training. The trainee should also be required to pass a test or tests, practical and theoretical, of the skills and knowledge for safe operation.

## Specific job training

# 73

Specific job training may follow basic training or be combined or integrated with it but is an essential element of training. It is intended to ensure the operator has sufficient knowledge and understanding to be able to operate the lift truck in conditions they are likely to face at work, and in accordance with their employer's policies, procedures, and site rules. This should include matters such as:

- Routine inspections of the lift truck and lifting mechanism
- Use of the lift truck in conditions the operator will meet at work, for example gangways, loading bays, automatic doors, rough terrain, cold stores etc
- Instruction on site rules, for example, site lay-out, one-way systems, speed limits, overhead obstructions, use of PPE etc
- Training in the work to be carried out, for example, loading particular types of vehicle, handling loads and materials of the kind normally found in the workplace, using the lift truck with working platforms where appropriate etc
- Safe systems of work, which should include custody arrangements to ensure keys are never left in unattended lift trucks, or where they are freely available, to prevent unauthorised people using them

## Familiarisation training

**74** Familiarisation training is the third stage of training and should be carried out on the job under the close supervision of a competent person.

**75** The operator undergoing familiarisation training should be assessed on the ability to apply, under normal working conditions, the skills learnt during basic and specific job training and any other feature of the operators work which it is not practicable to teach off the job. This should progress from simple tasks to more complex activities which the operator will be expected to carry out.

## Assessment of experienced operators

**76** Where employees claim to be trained and competent, employers should insist on evidence before authorising them to operate the lift truck in accordance with paragraph 69. This should illustrate sufficient training, relevant experience, and ability for the type of lift truck operations and handling attachments they will be required to use. Where adequate evidence is not available, the employer should arrange for an assessment of competence to be carried out by a competent person and provide any necessary training and re-assessment before allowing the employee to operate the lift truck and/or handling attachments where appropriate.

## Conversion training

**77** Conversion training enables trained and experienced lift truck operators to extend the range of lift trucks and/or attachments they are competent to operate. For example, a trained and competent operator of a counterbalance lift truck converting to operate a telescopic materials handler.

**78** An operator is also likely to require conversion training where, for example, they are already a fully trained operator on a counterbalanced truck but want to operate a significantly larger or more powerful counterbalanced truck.

# 79

Conversion training should be approached with the same attention to detail as basic training so that all gaps in, and variants on, existing skills and knowledge are covered. Training should also follow a similar pattern, i.e., basic, specific job and familiarisation training. Operators will need testing and assessment on their ability to operate the new lift truck in the same way as after initial basic training.

## Refresher training

# 80

Regular refresher training will ensure operators maintain good operating habits, learn new skills where appropriate and reassess their abilities. There is no specific time period after which refresher training is required, but industry best practice suggests automatic refresher training or retest after a set period, typically 3-5 years, may be reasonable in most cases. Further detailed guidance can be obtained from an accredited training provider.

# 81

Refresher training may also be appropriate when an operator has not used a lift truck for some time, appears to have developed unsafe practices or has had an accident or near miss.

## Monitoring and supervision

# 82

By the nature of the job, lift truck operators undertake potentially high-risk work, often in unfamiliar and changing environments, without direct supervision. Training will not in itself ensure the competence of individuals; this will develop with experience. Even experienced lift truck operators may need direct supervision if they are required to lift an abnormal load or lift in potentially hazardous conditions.

# 83

Every employer should therefore have sufficient arrangements in place to routinely supervise and monitor performance of employees, out in the field where appropriate, to satisfy themselves that employees understand, and adopt, the safe systems of work expected of them. This should include both 'active' methods, e.g. spot checks on site to observe an employee working and 'reactive' methods, e.g. investigating accidents and sickness absence records.

**84** Whilst the level of supervision provided to employees will depend on their level of experience and competence, it should never stop completely.

## Competence records

**85** Detailed records of all training and/ or assessments of competence should be maintained for every operator. This should include records of:

- All training, including conversion and refresher training, both external and in-house
- Experience, including different types of lift trucks operated and handling attachments used
- Assessments, including any assessment of training needs at initial employment and subsequently
- Familiarisation on different types and models of lift trucks, attachments etc

**86** An example of a suggested format for a training record is shown in Appendix 2.

## Visiting operators and drivers

**87** The person in control of premises used by visiting lift truck operators should ensure the operators are properly insured and adequately trained to safely operate those lift trucks, using information obtained from their employer.

**88** Visitors operating their own lift trucks or regular contractors' operators who frequently visit the same premises may be satisfactorily trained and have sufficient site knowledge to operate safely, but this should be checked and confirmed by the person in control of the site.

**89** If employees operate lift trucks at premises outside the employer's control, liaison with the person in control is required to ensure effective co-ordination and cooperation between all parties to ensure safe lift truck operations. This also applies to multi occupied sites, such as business parks and markets where lift trucks may be shared.

### **Agency workers and contractors**

**90** Before using agency workers or contractors, their competence should be assessed and confirmed, including consideration of the level of experience and familiarity with the work they will be required to undertake.

**91** The same health and safety standards that apply to permanent employees also apply to agency workers and contractors. They are likely to need some specific job and familiarisation training, as well as additional supervision.

**92** An employer's health and safety duties towards agency workers or contractors cannot be passed to another party by civil contracts. Employment agencies and employers of lift truck operators should make sure there is a clear written understanding of who is responsible for the day-to-day management of the health and safety of agency workers or contractors.

**93** Any agency or contract lift truck operator, in addition to the appropriate training and assessment of competence, must be issued with a Certificate of Competence in accordance with Regulation 18 of the Cranes and Lifting Appliances (Jersey) Regulations, 1978, either by their employer or the lift truck owner prior to operating lift trucks. See paragraph 69 for further information.

### **Using lift trucks on the public road**

**94** There is no requirement for an operator using a lift truck within a workplace to hold a driving licence. However, anyone driving a lift truck on the public road must comply with all relevant road traffic legislation and hold an appropriate driving licence (Category B in Jersey).

**95**

Lift trucks used on the road must be registered with Driver & Vehicle Standards (DVS) and be fit for road use including the following: Registration (number) plate, front and rear lights, indicators, a horn, a driver restraint system (seat belt), warning beacon and audible reversing warning.

**96**

More detailed guidance regarding the legal requirements relating to the use of lift trucks on the road, in respect of both driver and vehicle licensing, can be obtained from DVS.

**97**

When using lift trucks outside the workplace is unavoidable, for example to load or unload vehicles which cannot enter the workplace and are parked on public roads, a detailed risk assessment should be undertaken, including consideration of additional hazards that are not part of the work activity, such as movement of road vehicles and pedestrians.

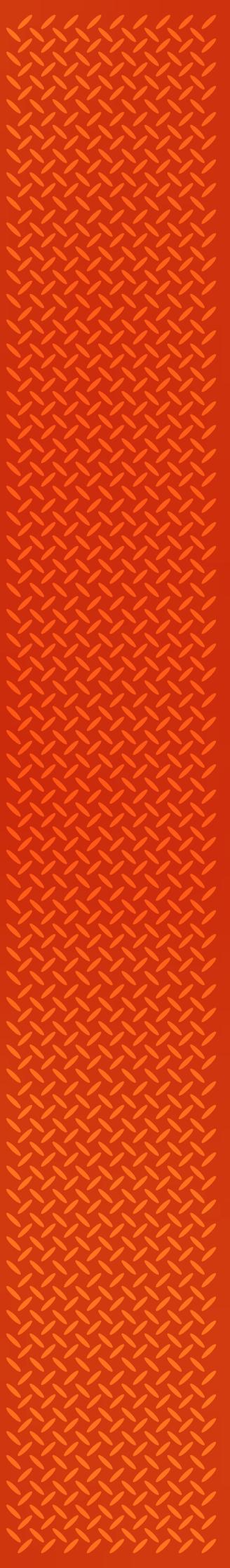


# 04

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## Working platforms on lift trucks

- Lift truck and platform compatibility



## 98

Lift trucks are primarily intended for lifting materials and not people. Working platforms on lift trucks will not provide the same level of safety as purpose-built equipment such as a mobile elevated work platform (MEWP). Where it is reasonably practicable to obtain and use purpose-built equipment for lifting people, particularly for regular and/ or routine operations, then such equipment should be used.

## 99

People should never be lifted on the forks or on a pallet, or something similar, balanced on the forks of a lift truck because they can easily fall off. However, for limited circumstances, lift trucks can be used with working platforms to allow people to carry out occasional, properly planned work at height.

## 100

An integrated working platform provides a higher level of safety than a non-integrated working platform (see below) and must always be considered first.

- **Integrated working platforms** are attachments with controls that are linked to and isolate the lift truck controls so that only a person in the platform can control the lift height of the platform
- **Non-integrated working platforms** are attachments with no controls in the platform, so a person in the platform cannot control the lift height of the platform. All lift truck and platform movements are controlled by the lift truck operator

## 101

A non-integrated working platform may only be used in exceptional circumstances for 'occasional unplanned use', for example:

- Non-routine maintenance tasks for which it is impractical to hire in purpose-built access equipment
- Tasks that would otherwise be carried out using less safe means of access such as ladders, because it is impractical to hire in purpose-designed people lifting equipment due to the short duration and occasional nature of the task
- Checking on high-level damage to racking suspected of causing an immediate risk or checking on the condition of damaged roof lights

- 102** Routine or planned tasks, particularly those associated with production or pre-planned activities such as periodic maintenance or stocktaking, are not exceptional circumstances and are not examples of occasional unplanned use.
- 103** Lift trucks fitted with non-integrated working platforms are not suitable for stock checking, order picking, routine maintenance or the transfer of goods or people from one level to another.
- 104** Further guidance on the use of working platforms on lift trucks is published by the HSE 'Working platforms (non-integrated) on forklift trucks: Guidance note PM28 (fourth edition)'.
- 105** Working platforms used for lifting people must comply with the specification set out the Certificate of Exemption No. 6587/1, a copy of which is reproduced as Appendix 3.
- 106** Every working platform used for carrying persons must also be thoroughly examined at least once in every 6 months by a competent person, and each time after exceptional circumstances which are liable to jeopardise the safety of the lifting equipment.

### **Lift truck and platform compatibility**

- 107** It is essential that the working platform is compatible with the lift truck on which it is used. Before any combination is used for the first time the working platform and lift truck manufacturer/supplier must be consulted.



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## Appendices:

- Appendix 1: Example format of an operator's certificate of competence
- Appendix 2: Example format for an operator's training record
- Appendix 3: Certificate of Exemption No. 6587/1
- Appendix 4: Useful Contacts

# APPENDIX 1:

## Example of operator's certificate of competence authorising use of a fork-lift truck

**HEALTH AND SAFETY AT WORK (JERSEY) LAW, 1989  
CRANES AND LIFTING APPLIANCES (JERSEY) REGULATIONS, 1978  
OPERATOR'S CERTIFICATE OF COMPETENCE**

I hereby certify that .....

(Full Name) is competent for the purpose of operating the following fork-lift truck

Type of fork-lift truck .....

Model / capacity .....

Attachments: .....

Signed: ..... Date: .....

Title: .....

**CRANES AND LIFTING APPLIANCES (JERSEY) REGULATIONS, 1978  
REGULATION 18: LIFTING OPERATIONS  
OPERATORS OF CRANES AND CERTAIN LIFTING APPLIANCES**

*No crane, excavator, fork-lift truck, mechanical grab, mechanical shovel or piling machine shall be operated by any person unless:*

*a) the person's employer, or the owner of the crane or appliance, has certified that the person is competent for the purpose; or*

*b) the person is operating the crane or appliance for training purposes under the direct and constant supervision of a person who has been so certified.*

*and the employer or owner, as the case may be, shall keep available for inspection by an Inspector any Certificate given under this Regulation.*

# APPENDIX 2:

## Example Of A Training Record

Employer name	
Business address	
Employee name	
Social Security Number	

Specific lift trucks the employee is authorised to operate, including use of specified handling attachments (see Appendix 1 for example of a suitable certificate of competence)

1	
2	
3	
4	
5	

<b>BASIC TRAINING</b>	
Lift truck(s) used for training	
Model/capacity	
Attachments	
Organisation carrying out training	
Location of training	
Duration and dates of course	Days from: _____ to: _____
Date of test	
Name of instructor/ assessor	

<b>SPECIFIC JOB TRAINING</b>	
Lift truck(s) used for training	
Model/ distinguishing number	
Location of training	
Date and duration of training	
Organisation carrying out training	
Name of instructor/ assessor	

<b>FAMILIARISATION TRAINING</b>	
Lift truck(s) used for training	
Model/ distinguishing number	
Date and duration of training	
Name of instructor/ assessor	

<b>REFRESHER TRAINING</b>	
Lift truck(s) used for training	
Model/ distinguishing number	
Location of training	
Date and duration of training	
Name of instructor/ assessor	

# APPENDIX 3:

## Certificate Of Exemption No. 6587/1

Health and Safety at Work (Jersey) Law, 1989

Safeguarding of Workers (Cranes & Lifting Appliances) (Jersey) Regulations, 1978

### Certificate of Exemption No. 6587/1 - issued 5th March 1979

*In pursuance of the powers conferred by Regulation 27 of the Safeguarding of Workers (Cranes and Lifting Appliances) (Jersey) Regulations, 1978, the Social Security Committee hereby exempts lift trucks from the requirements of Regulation 25(1) of the said Regulations subject to the conditions specified in the Schedule to this Certificate.*

*Expressions used in this Certificate shall have the same respective meanings as in the Regulations.*

*This Certificate shall remain in force until revoked by the Social Security Committee.*

### The Schedule

1. Persons shall only be carried on the forks of a lift truck on a stage or platform which complies with the following requirements:
  - a) The stage or platform must be effectively secured to the forks
  - b) The edges of the stage or platform must be provided with secure fencing at least 3 feet (920mm) in height consisting at least of upper and lower guard rails and toe boards not less than 6 inches (155mm) in depth, all of which are an integral part of the stage or platform
  - c) The weight of the stage or platform and the total load carried in it shall not exceed half the safe working load of the lift truck
  - d) The stage or platform must be plainly marked with its own weight
2. All dangerous parts of the lift truck shall be securely fenced to protect persons carried on the stage or platform from coming into contact with those parts.
3. A suitable locking device shall be fitted to the lift truck to ensure that the mast of the truck remains substantially vertical.
4. No person shall remain on the stage or platform whilst the whole lift truck is in motion.
5. No person shall remain on the stage or platform if the lift truck is used on an uneven base or floor.
6. Where reasonably practicable the lift truck lifting mechanism should be fitted with at least two suspension ropes or chains.

# APPENDIX 4:

## Useful Contacts

**Accrediting Bodies Association (ABA)** for workplace transport training

Website: [www.abawt.co.uk](http://www.abawt.co.uk)

**Forklift Truck Association (FLTA)**

Email: [mail@fork-truck.org.uk](mailto:mail@fork-truck.org.uk)

Website: [www.fork-truck.org.uk](http://www.fork-truck.org.uk)

**British Industrial Truck Association (BITA)**

Email: [info@bita.org.uk](mailto:info@bita.org.uk)

Website: [www.bita.org.uk](http://www.bita.org.uk)

**UKLPG**

Email: [mail@uklpg.org](mailto:mail@uklpg.org)

**Health and Safety Executive**

Website: [www.hse.gov.uk](http://www.hse.gov.uk)

**Driver & Vehicle Standards (DVS)**

Telephone: 01534 448600

Email: [dvsinfo@gov.je](mailto:dvsinfo@gov.je)

## Further Information

Further information on the application of this ACoP may be obtained by contacting the

**Health and Safety Inspectorate**

Telephone: 01534 447300

Email: [hsi@gov.je](mailto:hsi@gov.je)

Website: [www.gov.je/hsi](http://www.gov.je/hsi)

The ACoP can be viewed and downloaded from the HSI website





**Health and Safety Inspectorate**

Telephone: 01534 447300

Email: [hsi@gov.je](mailto:hsi@gov.je)

Website: [gov.je/hsi](http://gov.je/hsi)

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