

Forklift Operation Procedure

SAMPLE

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Purpose

This Forklift Operation Procedure sets out the minimum work health and safety (WHS) requirements for the safe operation, inspection and maintenance of forklifts at [Company Name]. It aims to prevent incidents such as collisions, crush injuries, falls from height, and damage to plant, products and infrastructure in warehousing and distribution, manufacturing and production, transport and logistics, building and construction, and retail and wholesale environments.

This procedure supports [Company Name]'s WHS policy, risk management framework and legal duties under relevant WHS legislation, regulations and codes of practice.

Scope

This procedure applies to all forklift operations undertaken by [Company Name], including but not limited to:

- Counterbalance forklifts
- Reach trucks
- High-reach and turret trucks
- Rough-terrain forklifts (e.g. on construction sites and yards)
- Pedestrian-operated powered pallet trucks (where applicable)

It covers:

- Operation of forklifts in warehouses, production areas, loading docks, yards, construction sites, retail back-of-house and external hardstands
- Loading and unloading trucks, containers and trailers
- Stacking, de-stacking and transporting pallets, stillages and other loads
- Use of attachments (e.g. fork extensions, clamps, jibs, carpet poles)

This procedure applies to:

- All workers who operate forklifts
- Supervisors and managers responsible for areas where forklifts are used
- Traffic controllers, spotters and doggers involved in high-risk loading operations
- Maintenance personnel and contractors who inspect, repair or service forklifts
- Visitors and other persons who may be affected by forklift operations

Definitions

Key Terms

- **Forklift (Powered Industrial Truck)** – A powered industrial truck equipped with forks or other attachments designed to lift, carry, stack or tier materials.

- **Operator** – A worker who holds the required high risk work licence (where applicable) and is authorised by [Company Name] to operate a forklift.
- **High Risk Work Licence (HRWL)** – A licence issued under WHS legislation authorising a person to perform high risk work, including LF (forklift truck) and LO (order-picking forklift truck) classes.
- **Attachment** – Any equipment fitted to the forklift (other than standard forks) to enable specialised lifting or handling of loads.
- **Rated Capacity** – The maximum load that the forklift is designed to safely lift at a specified load centre and mast configuration.
- **Pre-start Inspection** – A documented check of the forklift's condition and safety features carried out before the forklift is used each shift.
- **Exclusion Zone** – A clearly defined area around forklift operations where pedestrian access is restricted or prohibited.
- **Load Centre** – The horizontal distance from the vertical face of the forks to the centre of gravity of the load.

Roles and Responsibilities

Officers (e.g. Directors, Senior Managers)

- Ensure adequate resources are provided to implement and maintain this procedure.
- Verify that forklift risks are identified, assessed and controlled in accordance with WHS legislation.
- Review WHS performance data (e.g. incidents, inspections, audits) related to forklift operations.

Managers and Supervisors

- Ensure only trained, competent and authorised operators use forklifts.
- Confirm all required high risk work licences are current and recorded.
- Implement and monitor traffic management plans in areas under their control.
- Ensure pre-start inspections are completed and defects are reported and rectified.
- Enforce compliance with speed limits, load limits and exclusion zones.
- Arrange training, refresher training and competency reassessment as required.
- Investigate forklift-related incidents and near misses and implement corrective actions.

Forklift Operators

- Hold the appropriate high risk work licence (where required by law).

- Follow this procedure, safe work method statements (SWMS) and manufacturer's instructions.
- Complete pre-start inspections before operating a forklift.
- Report defects, hazards, incidents and near misses immediately.
- Operate forklifts only in areas where they are authorised and competent.
- Never carry passengers unless the forklift is specifically designed and fitted for that purpose.
- Refuse to operate equipment that is unsafe or outside their level of competence.

Other Workers and Contractors

- Comply with pedestrian and traffic management controls, including exclusion zones and walkways.
- Follow directions from supervisors, spotters and traffic controllers.
- Report unsafe forklift operation or hazards to their supervisor.

WHS Personnel

- Support risk assessment and development of traffic management plans.
- Provide or arrange forklift safety training and awareness sessions.
- Conduct inspections, audits and reviews of forklift operations.
- Maintain WHS records related to forklift safety.

Legal and Other Requirements

[Company Name] will comply with all relevant WHS legislation, regulations, Australian Standards and codes of practice applicable to forklift operations, including but not limited to:

- WHS Act and WHS Regulations applicable in the jurisdiction of operation
- Requirements for high risk work licensing of forklift operators
- Applicable Australian Standards related to industrial trucks and load handling
- Safe Work Australia and state/territory regulator guidance on forklift safety

Risk Management

Hazard Identification

Forklift-related hazards must be identified proactively and whenever there are changes to work processes, plant, layout or staffing. Typical hazards in warehousing, manufacturing, transport, construction and retail environments include:

- Interaction between forklifts and pedestrians in shared workspaces