



TRAINING RECOMMENDATIONS FOR WORKPLACE TRANSPORT

E-LEAFLET

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INTRODUCTION

Welcome to the new, updated and revised *Training Recommendations for Workplace Transport*.

This e-leaflet summarises the main topics related to workplace transport operator training found in the full version of *Training Recommendations for Workplace Transport*, available to purchase from www.rtitb.com/assist.

Training Recommendations for Workplace Transport has been written to provide employers, training organisations, and instructors with the information needed to help them meet the requirements and standards of effective workplace transport instruction.

You will find a lot of useful information in this booklet, but it should not be seen as a substitute for core HSE documents such as *L117*, *HSG76* and *HSG136* – anybody involved in the operation or control of, or the training of operators working with workplace transport should read and familiarise themselves with these documents. In particular, it is highly recommended that you familiarise yourself with Approved Code of Practice *L117: Rider-operated Lift Trucks - Operator Training and Safe Use* if you have not done so.



ICONS

Throughout this e-leaflet you will find icons illustrating useful tips and advice. Some will highlight important information, and some will expand further upon the topic being discussed.



Warning

These boxes contain important information.



Further Information

The information in these boxes expands on the topic being discussed.



1. SELECTING OPERATORS

Always think about a potential operator's health and fitness because it is central to their safety and the safety of the people affected by their work. You should consider conducting a risk assessment to establish the hazards involved with the work they will be doing and the environment in which they will be carrying out the work. As well as their general health and fitness, you should also think about:

- ◆ Their ability to learn and pick up new skills
- ◆ The job they will be expected to do
- ◆ The environment in which they will be working
- ◆ Hazards associated with the environment or the job
- ◆ Physical or mental impairments that might pose a threat to the health and safety of others.

Of course, disability should not automatically exclude an individual from operator training. If necessary, you should seek medical advice about the individual's suitability. In some cases it may be the case that adjustments can be made to enable those with certain disabilities to work as operators. When considering candidates with disabilities you must always assess and plan appropriately and always remember the Equality Act 2010.

 You should never allow anybody who is unfit due to alcohol or drug usage (prescription or recreational) to operate workplace transport under any circumstances.

It is also important to take their attitude and maturity into account. An MHE operator must have a responsible attitude toward their work, their work environment, their colleagues and themselves.

MHE operators must be over the minimum school leaving age, 16, unless they are required to operate in a port, in which case the minimum age is 18.

 Under no circumstances should anybody under the age of 16 be permitted to operate a lift truck.



2. TYPES OF OPERATOR TRAINING

When selecting potential candidates for Novice training, consider their ability to progress satisfactorily through a range of training scenarios.

- ◆ Initially, they will be required to undergo Basic operator training and then pass a recognised Basic Operating Skills Test.
- ◆ As well as Basic operator training, operators must also undergo Specific Job training (concerned with the controls of the machine to be used, the environment and conditions in which it will be used, the rules of the site, and training in the work to be carried out).
- ◆ Finally, the operator must undergo Familiarisation training, which is training on the job as they put the skills learned into practice in the context of the employer's operation.

 Only when all three stages of training have been satisfactorily completed can an operator be considered fully competent, and an authorisation to operate issued.

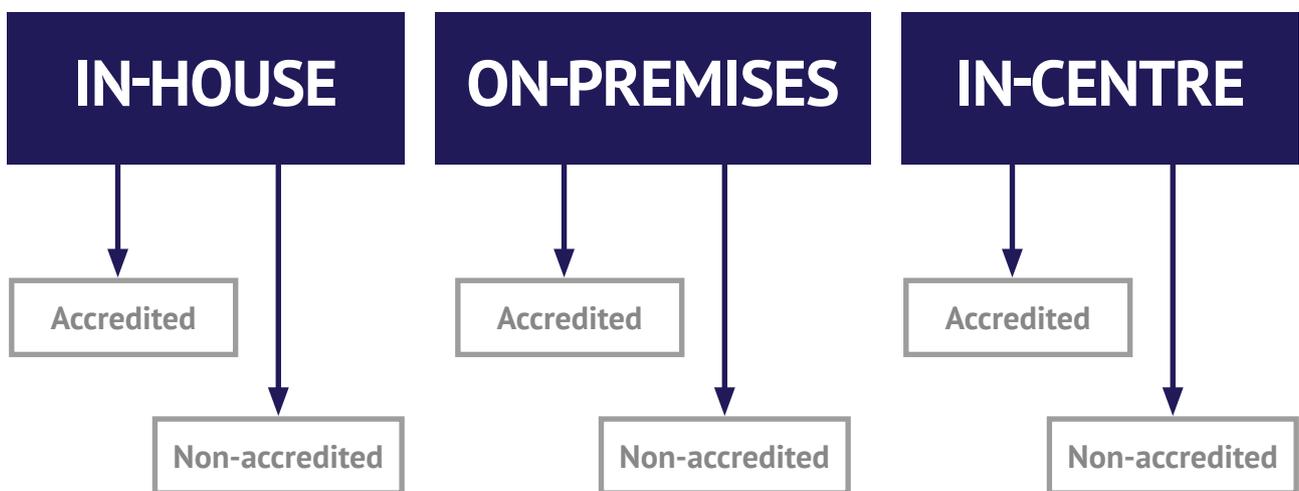
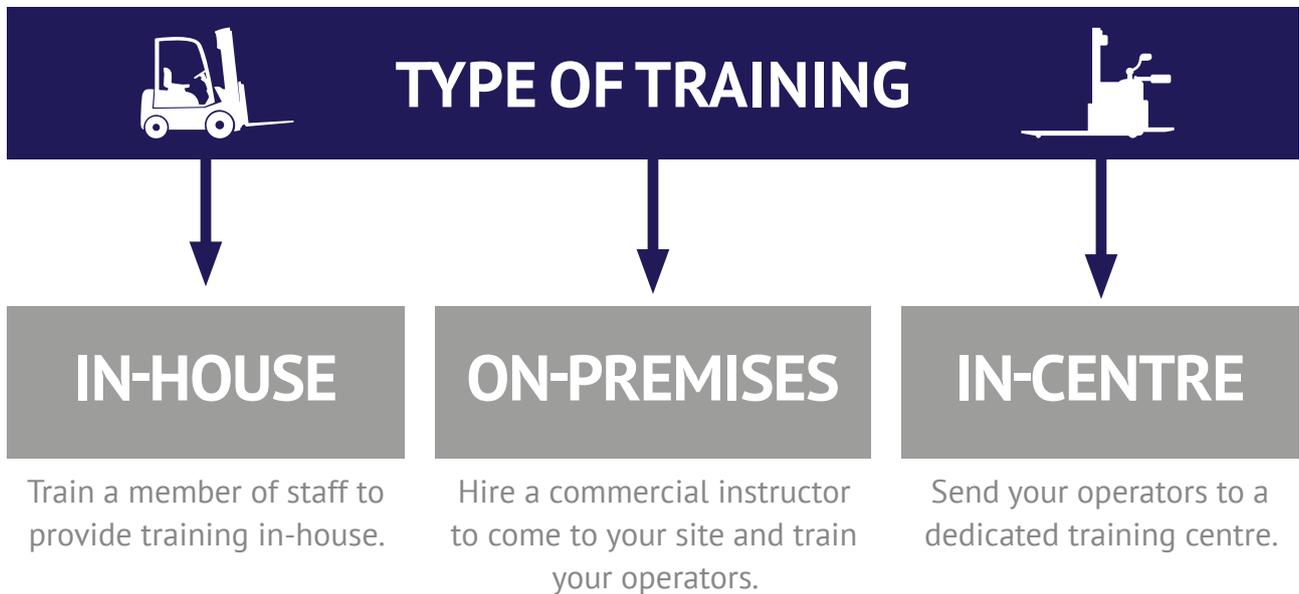
It is important to remember that holding a certificate is not the same thing as being competent. The best way to maintain an operator's competence is through regular assessment and training. Refresher training should form part of the overall supervision and monitoring processes in order to maintain standards through the correction of unprofessional, unsafe working practices that might put operators or others at risk.

Additionally, Conversion training should be provided to certificated operators preparing to migrate from one particular type of workplace transport to another. Conversion training should also be considered in the scenario where a new attachment is introduced to the work the operator carries out.



3. TRAINING PROVIDERS

There are a number of routes open to companies wishing to train their workplace transport operators, but not all routes will necessarily help employers meet their regulatory responsibilities.



The Provision and Use of Work Equipment Regulations (PUWER) make it clear that employers have a responsibility to ensure managers, supervisors and operators of workplace transport have received adequate training for the purposes of health and safety. Fortunately, the HSE provides guidance in the form of their ACoP *L117 Rider-operated Lift Trucks: Operator Training and Safe Use*.

The special legal status that the ACoP enjoys means that if an employer is prosecuted for breach of health and safety law and is found not to have followed its provisions, the courts will find them at fault (unless it can be proven in some other way that they did in fact comply with the law).

RTITB offers accreditation services for workplace transport training, ensuring that the organisations that offer this type of training comply with the standards outlined in *L117*.

RTITB accredited organisations are required to follow our criteria on facilities and equipment, and use our course guides. Falling short in any areas relating to accreditation criteria could result in an organisation losing their accredited status. This means that employers can feel confident that if the training provider meets RTITB standards then the right information and training will be provided.

Furthermore, every individual registration application provided to RTITB's National Operator Registration Scheme (NORS) database by accredited organisations is checked and validated before certificates are issued, to ensure compliance with the required standards.

ACCREDITED TRAINING	NON-ACCREDITED TRAINING
Independent verification that training adheres to the minimum standards set down in <i>L117</i> .	No independent verification that training adheres to the minimum standards set down in <i>L117</i> .
Facilities and equipment used for training are of an approved standard.	Facilities and equipment do not have to meet a set standard.
Training is provided by a qualified and registered instructor who has undergone regular independent examination of their competence to deliver this type of training.	The instructor may well be qualified and registered but this does not mean that the training they deliver meets the required standards of <i>L117</i> .
Registered instructors working for accredited organisations must attend registration training and assessment on a regular basis to ensure effectiveness and personal development.	There is no guarantee that the instructor has continued their personal development or that they are up-to-date on current methods, standards or legislation.
Certified database of training records.	No guarantee of certification and training records.



4. THE RTITB ENDORSED BASIC OPERATING SKILLS TEST

The purpose of any MHE training course is to provide operators with the theory knowledge and practical skills to operate the equipment safely and competently. Testing and assessment play a vital role in the process because they enable the instructor to judge how well the candidate has taken on-board the key messages and how well they apply them to operation. However, employers, instructors and operators should never view training purely as an exercise in passing a test; it is the beginning of a lifelong learning and development process that should lead to safe and competent operation.

The Basic Operating Skills Test for counterbalance and reach trucks was first introduced by RTITB in 1972, and has since undergone redevelopment and been recognised by the HSE as the standard form of testing for all accrediting bodies.

The standards that lie at the heart of the Basic Operating Skills Test are now overseen and administered by the Accrediting Bodies Association for Workplace Transport (ABA). The ABA is responsible for maintaining and updating testing standards for equipment that fall in-scope of the ABA, while RTITB maintains and updates testing standards for equipment that falls outside the scope of the ABA.

The test is made up of three elements, all of which should be passed in order for the candidate to receive their Certificate of Basic Training:

- ◆ Associated knowledge theory exam
- ◆ Pre-use inspection
- ◆ Practical operating skills test.

 RTITB have created and standardised tests for a variety of equipment types; these can be found in our range of instructor guides available through the RTITB online shop www.rtitb.com/assist.



5. TRAINING RECORDS

To ensure that employers can prove that they have met their obligations under the Health and Safety at Work etc. Act 1974, they must be able to provide not only evidence that the operator attended and passed a course, but also detailed information concerning what was included in the course and any other training undertaken by the operator.

This can be achieved by keeping on file records of courses attended and passed by the operator, along with copies of any certificates that may have been issued.

An effective record of training should include:

- ◆ Operator's (candidate's) name
- ◆ Company's name
- ◆ Date and duration of the training
- ◆ Course title (including equipment type and ABA category code if applicable)
- ◆ Instructor's name and registration number
- ◆ The subject areas covered during the course
- ◆ Assessment type and score
- ◆ Instructor comments and recommendations
- ◆ Instructor's signature as verification of course delivery
- ◆ Operator's (candidate's) signature as verification of understanding
- ◆ Test scores
- ◆ Examiner's name and registration number.



The MyRTITB TrainingFriend app provides an easy-to-use paperless tool for recording all aspects of candidate training and assessment, including the all-important training record. Not the only that, TrainingFriend will also upload all relevant candidate information to NORS for simple, one-click registration. To find out more about MyRTITB TrainingFriend, visit <https://www.rtitb.com/myrtitbtrainingfriend-app/>.



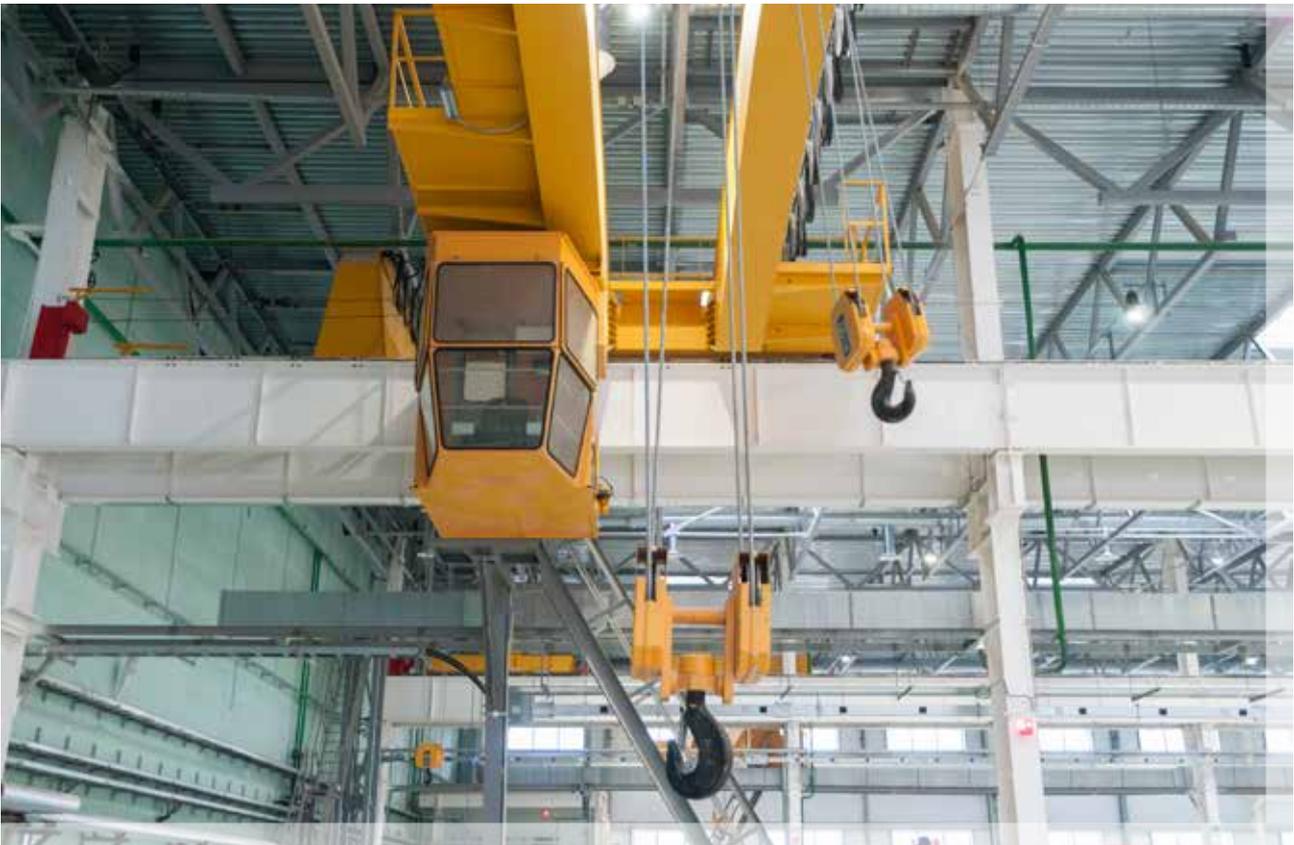
6. AUTHORISATION TO OPERATE

Once an employer is satisfied that an operator has successfully undergone Basic, Specific Job and Familiarisation training they can issue an authorisation to operate on their premises. Training records are critical and employers should always verify that there is documentary evidence of the operator's training and competence through all three stages before issuing authorisation.

An authorisation to operate will be specific to the nature of the business, its environment and the equipment used, which is why Specific Job training and Familiarisation training are so important, and why it is that an authorisation to operate can only be issued by the employer. It is the employer's acknowledgement that the operator is qualified to operate specific equipment used for handling load types within their specific environment.

- ◆ The authorisation to operate should state:
- ◆ The operator's name
- ◆ The expiry date
- ◆ The date of the authorisation
- ◆ The types or categories of equipment to which the authorisation relates
- ◆ Any special conditions or limitations associated with the authorisation
- ◆ The areas of the organisation's premises where the operator is authorised to operate.

 Under no circumstances should an employer allow anybody to operate on their premises without a written authorisation to operate.



7. SUPERVISION OF OPERATORS

While regular refresher training is required to maintain standards of operation, it is only through supervision and appraisal of the operator's performance that strengths and weaknesses can be identified and corrective action taken as and when required.

Every year thousands of injuries directly linked to MHE usage are reported, and all too often a lack of training and/or supervision is found to be the reason for the incident. Employers therefore, under health and safety law, have an obligation to ensure that they 'provide information, instruction, training and supervision to protect, so far as is "reasonably practicable", employees' health and safety at work' (*INDG345: Health and Safety Training – A Brief Guide*, p1).

Supervision should therefore play a central role in monitoring safe working practices in any workplace transport operation. Guidance from the HSE states that the level of monitoring should be consistent with the risks involved in the operation, and that even when risk is perceived as low, supervision is necessary to ensure that standards are maintained.

Supervisors should:

- ◆ Help control risk
- ◆ Communicate effectively to maintain a flow of information on safety, both to operators and management
- ◆ Encourage cooperation in safe working practices
- ◆ Help organise activities in a way that maintains a safe working environment.

It is essential that those assigned the responsibility of supervising workplace transport operations are trained in and have knowledge of the methods employed when using the equipment. They should also be aware of the risks associated with operation and the precautions that can be taken to minimise risk. This does not mean that they necessarily have to be qualified operators themselves, just that they must have undergone adequate training. As well as good all-round knowledge and understanding of the equipment and workplace procedures, supervisors should have a thorough understanding of legislation on the safe use of the equipment in question, and safe working environments.



8. FIND OUT MORE

The full *Training Recommendations for Workplace Transport* covers each of the topics found in this e-leaflet, bringing everything you need to know about operator training and supervision together in one handy reference guide.

Visit RTITB Assist (www.rtitb.com/assist) or call us on **01952 520207** to order your copy today.

