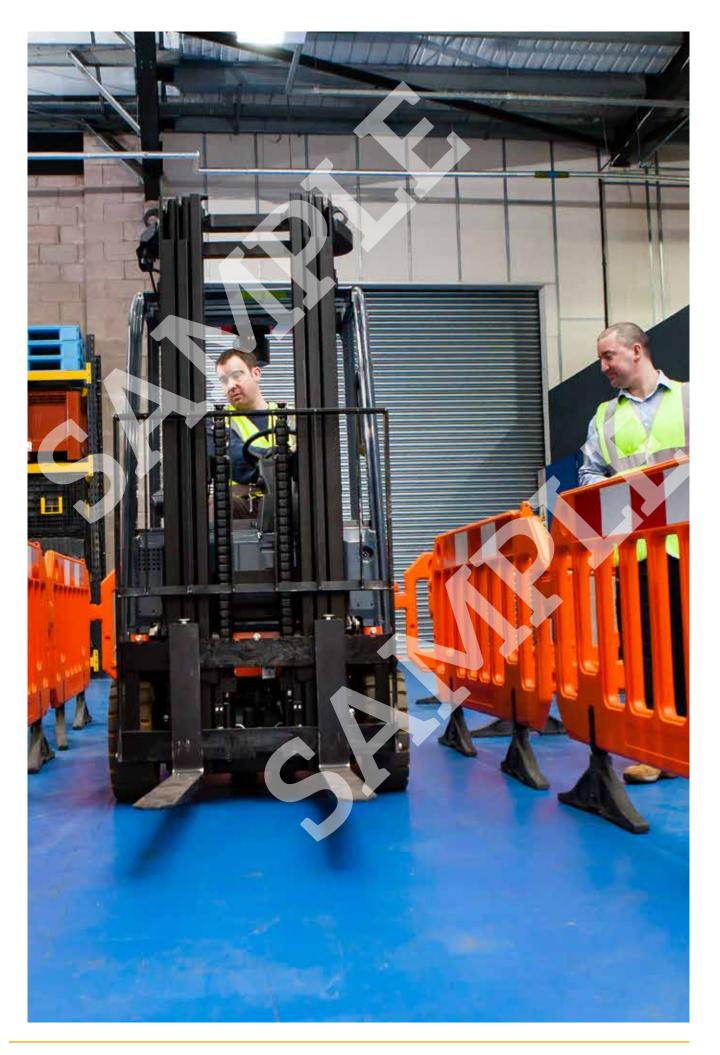
SAMPLE TRAINER'S GUIDE & USB CONTENT

Counterbalance Lift Truck (Up to 10,000kg Rated Capacity)

LTG1 (ABA Codes B1 & B2)





Sample Guide

The pages in this sample have been taken from

LTG1 Counterbalance Lift Truck (up to 10,000kg rated capacity) ABA codes B1 and B2.

(It is not a full guide, it is just selected pages from our 402 page guide).

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TERMS & CONDITIONS OF USE

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RTITB will maintain and update this course content. We will provide RTITB accredited organisations with replacement, updated pages, where possible. Major revisions will result in a complete re-issue, which users will be required to purchase.

Course Information: Novice

Ratios

3:1:1, 2:1:1, 1:1:1

Minimum Training Duration – (See Syllabus P22-23)

3:1:1 - 32 hours 30 minutes

2:1:1 - 26 hours

1:1:1 - 19 hours 30 minutes

Objective

By the end of this course, candidates will be able to discuss and demonstrate:

- Safe and efficient operation of a counterbalance lift truck within the workplace, including their duties under the Health and Safety at Work, etc. Act 1974 and the risks associated with truck use.
- Pre-use inspection, appropriate maintenance tasks and reporting processes.
- Authorisation to operate arrangements.

Location

Classroom and practical training area. Suitable access to an appropriate practical training area must be available. The practical training area must be clearly identified and protected, and should be segregated from normal working activities.

Equipment

A suitably maintained and legally compliant truck appropriate for the course, with sufficient loads and appropriate practical facilities available for use during training. Session equipment is detailed at the beginning of each session.

Candidate Specification

All candidates should be reasonably fit, both physically and mentally, have the learning ability and potential to become competent operators and be over the minimum age of 16 years (except in ports, where they must be at least 18 years old, unless they are undergoing a suitable course of training and are properly supervised by a competent person). Children under 16 should never operate lift trucks. Candidates selected for this course should be reliable and have a responsible attitude towards the workplace.



The DVLA's At a Glance Guide to the Current Medical Standards of Fitness to Drive can be applied to all work with lift trucks.

Syllabus

The following syllabus contains the required teaching sessions for this course. Instructors are at liberty to conduct sessions to durations that suit the needs and abilities of their candidates (suggested durations are included with each session, **but these are not mandatory**). **Total course times must meet the minimum course duration.** In some circumstances it will be necessary to extend durations, depending on candidate ability.

Course S	yllabus: Novice
Session	Session Title
S 1	Course Introduction
S2	Theory
S3	Introduction to the Truck
S4	Controls and Instruments
S5	Operation of the Hydraulic Controls
S6	Preparing, Moving, Stopping and Parking the Truck
S7	Basic Steering
S8	Accurate Steering
S 9	Confined Area Steering
S10	Chicane
S11 a or b or c	Fuel Source
S12	Pre-use Inspection
S 13	Truck and Load Stability
S14	Load Assessment
S15	Handling Empty Pallets
S16	Handling Palletised Loads
S17	Handling Different Loads
S18	Vertical Face and Undercutting
S19	Stacking – Eye-level
S20	Stacking – High-level
S21	Turning in a Narrow Aisle
S22 a or b	Industrial Racking – Low-level
S23 a or b	Industrial Racking – Eye-level
S24 a or b	Industrial Racking – High-level
S25	Negotiating Inclines
S26	Bulk Stacking
S27	Vehicle Loading and Unloading
	Assessment
S28	Course Close

Ratio	3:1:1	2:1:1	1:1:1
Minimum Training Duration	32 hrs 30 mins	26 hrs	19 hrs 30 mins

The following optional sessions can be included during your course delivery to supplement the core sessions listed in the syllabus. These sessions are not mandatory, but they may be relevant to your training group and their working environment.

Please note that if you decide to run either of these sessions, the time spent delivering them must be added to the required minimum training duration – **these sessions cannot be run instead of core course content outlined in the syllabus.**

Optional Sessions - Novice				
Session	Session Title	3:1:1	2:1:1	1:1:1
OS1	Fork Positioners	1 hr	50 mins	40 mins
OS2	Operating on a Public Road	30 mins	30 mins	30 mins

Session Library

Choose an experience level and then pick your sessions.

(Remember that some sessions are divided into "a" and "b" variants to cater for equipment variations.)

L117: Rider-operated Lift Trucks – Operator Training and Safe Use

Explain that this document supports employers and those responsible for the safe operation of lift trucks by giving advice on how to comply with the law in relation to operator training and equipment usage.

Discuss the ACoP's special legal status. Explain that in the event of an incident, if you are proved to have not followed the relevant provisions of the ACoP you will be found at fault – unless you can show that you have complied with the law in some other way.

Safe Driving Practices

Explain that many accidents occur because operators are either inexperienced or untrained. These accidents range from relatively minor to very serious and may result in injury (or death) to the operator or other persons/damage to the equipment, buildings and facilities.



Discuss this point with the candidates using any relevant, up-to-date examples, which can be found at www.rtitb.co.uk/news.

Discuss the possible locations in which trucks might be used, emphasising the different constraints and manoeuvring limitations presented by different environments.

The candidates should also consider the risks associated with pedestrians in different types of environment where trucks might be used: for example, employees in a distribution centre who have undergone some form of health and safety induction should be more aware of the dangers of material handling equipment than customers shopping in a wholesalers where trucks move products from storage areas or loading bays through to the shop floor. It could be argued that in one of these settings the operator will need to be better attuned to the potential actions of pedestrians, in particular children – although the actions of workers in a high-pressure environment like a distribution centre shouldn't be taken for granted. All workplace equipment operators have a duty of care to their colleagues, and all necessary precautions must be taken to ensure their safety.

Emphasise that the equipment that will be used on this course is designed to be perfectly safe, providing that it is used correctly. Point out that there are specific rules covering operating practices that help minimise the risks presented by the equipment, and that this course will concentrate throughout on safe, correct approaches to using the equipment which comply with those rules.

Introduce and discuss the following points, which will be covered in detail throughout the practical sessions of this course:

- Personal Protective Equipment (PPE)
- Correct start-up and shut-down procedures
- Steering controls
- Safe manoeuvring
- Correct observations and blind spot safety awareness
- The basics of picking up and depositing loads
- The basics of stacking and de-stacking (where necessary)
- Safe use of industrial racking
- Bulk stacking
- Pre-use inspections and fault reporting
- Refuelling or battery charging and maintenance.



Refer the candidates to relevant hand-outs on the issues discussed in this session, for example, HSE's leaflet *INDG457*: *Use Lift Trucks Safely – Advice for Operators*.



You'll find an HSE press release about a company that was fined after a worker was injured in a collision with a lift truck in the 'Supporting Documents' menu of the USB multimedia content provided with this guide.





Preparation

Before commencing this session, ensure that the truck is correctly parked in an open area with sufficient head room and that all candidates have a safe, unobstructed view of the hydraulic controls.



You'll find an optional fork positioner session (OS1) in the session library. This session can be used to supplement the topics discussed here, although you should ensure that manual fork adjustment is also covered in detail (as applicable). The time spent delivering this session must be in addition to the overall training duration.

Functions and Component Parts

Identify and discuss the various components of the hydraulic system and, depending on the experience of the group, explain how hydraulics function – you should use a visual aid during your explanation.

Explain that hydraulics is the power of a liquid under pressure passed through pipes. When the controls are activated, the pump unit supplies hydraulic oil from a reservoir to the hydraulic cylinders.



Preparation



If the 'Operation of the Hydraulic Controls' session has previously been delivered, the manoeuvres in this session may start with the forks in the parked position and the candidates may operate the hydraulic controls to position them in the travel position before moving off. If the candidates have not yet been instructed in the use of hydraulic controls, the truck must be pre-set in the travel position for the duration of this session.

Moving off Forks Leading and Forks Trailing, Controlled and Emergency Stopping

Preparing to Move Off

Recap on the previous sessions taught by demonstrating how to prepare the truck for moving off:

- Mount the truck and adjust the operator position
- Start the truck using the appropriate procedure for the type of truck
- Operate the hydraulics positioning the forks into an appropriate travel position.

Operator Position



Explain and demonstrate the operating position that should be adopted while travelling forks leading and forks trailing – look in the direction of travel and maintain a firm grip on the steering assistor. Explain that either hand can be used to hold the steering assistor in order to facilitate effective observation.



Moving off and Stopping



Stress the importance of wearing a seatbelt and ensuring doors are securely shut before setting off.



Explain that it is important that an effective all-round observation is made before moving off – under no circumstances should the equipment be moved if any pedestrians are within the immediate vicinity of the truck.

Forks Leading



Explain and demonstrate the correct method of moving off and stopping, forks leading, in a straight line:

- Select the travel direction using the gear/directional control (where applicable)
- Complete an all-round observation, including overhead areas for potential obstructions
- Release the park brake (where applicable)
- Ensure that the correct grip is applied to the steering assistor
- Look in the direction of travel
- Apply gradual pressure to the accelerator control for smooth, progressive acceleration
- Release the accelerator and apply the brake gradually to come to a controlled stop
- Apply the park brake (where applicable)
- Select neutral using the gear/directional control (where applicable).



Stress that operators should keep their limbs within the confines of the truck when travelling.

Parking

Explain the precautions that should be taken when safely parking the truck. Emphasise the importance of parking the truck where it will not cause an obstruction.



Ask the group to suggest the types of areas where the truck should not be parked. Ideas might include:

- Blocking emergency exits
- Obstructing emergency/fire fighting equipment
- Obstructing stairs.

Also discuss the need to park the truck correctly, which requires the operator to:

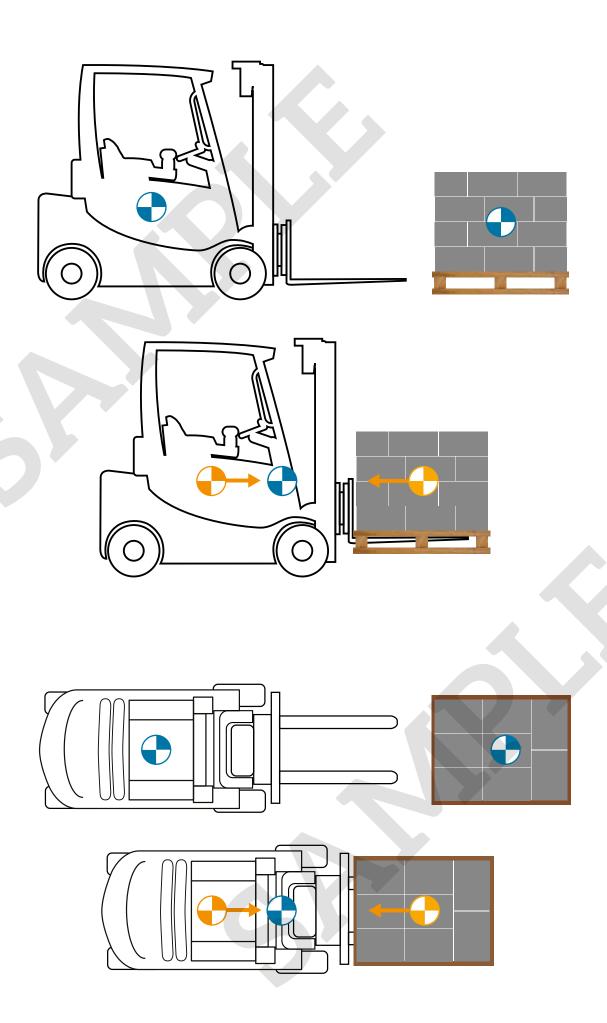
- Straighten the steering wheel(s)
- Apply the park brake and select neutral (where applicable)
- Lower the forks to the park position (where applicable) recap on the park position if necessary
- Remove the key (if applicable).



Ensure that throughout the session, each candidate is given sufficient time to practise the manoeuvres taught:

- Adopt a safe operating position
- Prepare the truck for travel (including fork position where applicable)
- Operate the truck in a straight line, forks leading and forks trailing, and bring the equipment to a controlled stop
- Perform an emergency stop forks leading and forks trailing
- Parking.





Stability

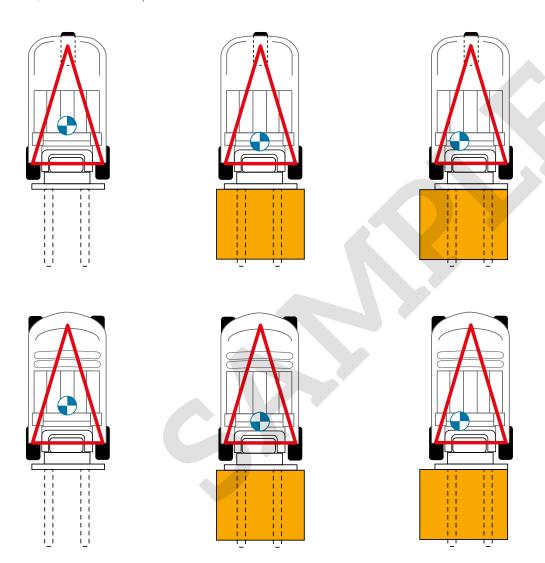


Discuss other factors that might affect stability. Have them make a list on a flip chart or whiteboard (change of speed and direction, weight, load centre, site conditions, etc.) and divide them between longitudinal and lateral stability.

Lateral Instability

Explain that lateral instability is the result of the centre of gravity moving too far to either side (right or left) of the truck. There are many potential causes of lateral instability, including:

- Turning at excessive speed
- Turning with raised fork arms or a raised load
- Turning across an incline
- Driving one wheel over a bump or pothole violently
- Incorrect placement of the load on the forks, so that its CoG is to one side
- Operating with a flat or partially deflated pneumatic tyre
- Live loads, which create a pendulum effect.



S12 – Pre-use Inspection



Suggested Durations

RATIO	NOVICE	EXISTING	REFRESHER	CONVERSION
3:1:1	1 hr 30 mins	1 hr 30 mins	N/A	45 mins
2:1:1	1 hr	1 hr	N/A	35 mins
1:1:1	40 mins	40 mins	N/A	25 mins



To show the candidates how to inspect the truck prior to use, how to record the results of the pre-use inspection and steps that should be taken in the event that defects are found.



Practical training area



- Truck
- Manufacturer's operator manual
- Pre-use inspection forms
- PPE.



Upon completion of this session, candidates will be able to discuss and demonstrate the process of inspecting a truck prior to use. Additionally, they will be able to correctly record the results of the inspection and discuss steps to take in the event that defects are identified.

Routine Inspection

Explain that the pre-use inspection is a fundamental element of safe operating which helps prevent incidents occurring as a result of mechanical failure. Operators have a regulatory obligation to inspect work equipment prior to use in order to check that it is safe and suitable for its intended purpose. This means completing a visual inspection combined with a check that all necessary systems function.

Stress that under no circumstances should operators attempt any repairs or put themselves or others at any risk by operating defective equipment. Mechanical skills are not required to complete a satisfactory pre-use inspection.

System of Checking

Explain that prior to any checks being made it is imperative that the following is established:

- The truck is in park position, and that the parking brake is applied and neutral is selected (as applicable). The equipment must be switched off with the key removed
- Correct and personal protective equipment (PPE) is used wherever required
- The manufacturer's equipment recommendations are followed.



Operators should refrain from stepping over forks and should instead walk around them when inspecting the truck. It should be noted that during the inspection, the operator will be required to check lifting components that are hidden from view when the forks are lowered to their park position; however, they should be viewed from the safety of the operating position – the operator should not leave the operating position and must never stand underneath the raised forks in order to inspect these components.





Demonstrate how to make checks of the following components (where applicable) in accordance with the manufacturer's operator manual and all safety procedures:

- Fork arms/attachment (where applicable)
- Carriage plate
- Backrest extension (where applicable)
- Mast
- Mast rollers/slides
- Lift chains
- Chain pulleys
- Hydraulics
- Wheels
- Tyres
- External condition
- Rated capacity plate
- Operating position
- Operator's seat
- Gas truck components as applicable
- Starting procedure, engine trucks
- Starting procedure, electric trucks
- Lights
- Audible warnings
- Hydraulic controls
- Drive and braking
- Steering.

You will find guidance on checking the components above in the pre-use inspection marking criteria section of the Basic Operating Skills Test later in this guide.



Additional items may require inspection, depending on truck application and attachment.



It is important not to touch pressurised hydraulic lines, oil, lubricants or any other liquids as they may cause personal injury.

Show the candidates how to correctly complete the pre-use inspection form and the relevant information that should be noted. Explain that, depending on the type of truck used, additional components may need to be added to the pre-use inspection routine and inspection paperwork.



Ensure you make the candidates aware of the items which will be considered mandatory during the Basic Operating Skills Test.

Fault Reporting

Discuss the actions to take when a defect is identified during a pre-use inspection, include:

- Do not use or operate the equipment
- Log the fault on the inspection sheet and complete any further visual inspections if safe to do so
- Isolate the equipment from use and display signage that it is "out of service"
- Inform a manager or supervisor of the defect.

Discuss the action to be taken if a fault occurs whilst the truck is in use: (ensure that you discuss different procedures used within different operations).

- Safely park the truck straight away
- Isolate from use and mark the truck "out of service"
- Inform a manager or supervisor of the defect.



Allow the candidates to carry out a pre-use inspection of the truck (depending on attendance numbers, you may wish allow the candidates to perform the inspection as a group or individually with the other candidates giving peer review).

At the start of each subsequent training day, ensure that each candidate carries out a pre-use inspection, using the employer's or manufacturer's recording system (if appropriate), under the direction of the instructor. The candidates should also be asked questions relating to defect reporting procedures to confirm their understanding.

You will find a list of "show-me-tell-me" pre-use inspection questions in the Appendices. These should be used throughout the course to check and confirm candidate knowledge and competence with regard to the pre-use process.

End of S12



Vehicle Loading Confirmation Questions

- 1. Q. Name 3 safeguards that can be used to reduce the risk of drive-aways.
 - Traffic lights
 - Use of vehicle or trailer restraints
 - Key custody arrangements
- **2. Q.** How do you properly secure a vehicle before starting loading/unloading?
 - Parking brake
 - Neutral
 - Engine off
 - Wheels chocked
 - Stabilisers used if available
- **3. Q.** What should the load bed be checked for before loading?
 - Debris
 - Condition
 - Weight capacity
- **4. Q.** How should a load be spread on the load bed?
 - Evenly
- **5. Q.** What check(s) must be made before unloading/loading a vehicle?
 - Load movement has not occurred
 - Load will not move/fall when restraints are released
- **6. Q.** Where should a trailer be parked before loading/unloading?
 - Firm level ground
- **Q.** Where more than one company is involved in the loading/unloading of a vehicle what arrangements must be agreed?
 - Communication
 - Equipment
 - Co-operation
 - Instructions
 - Processes



Pre-use Inspection Show-me-tell-me Questions

The following exercises can be used to confirm candidate understanding of and competence in carrying out checks of the mandatory items covered in the pre-use inspection section of the Basic Operating Skills Test. You can use the exercises in a variety of ways throughout your course – **for example, you may wish** to randomly select candidates at intervals and select a task to ask them about; alternatively, you might choose to pick a number of exercises as a recap at the beginning of each training day.

Each show-me-tell-me exercise is designed to encourage candidates to not only show a verbal understanding of the task in question, but also to demonstrate their ability to perform the component check. In this way you will be able to gauge their ability and their readiness for the Basic Operating Skills Test and their role as a lift truck operator.

Fork arms	How should the fork arms be checked?	Each fork arm should be checked for wear, cracks and distortion. Check for wear causing thin, jagged edges at the fork tip and heel. Particular attention should be paid to the fork hooks and carriage plate; constant movement between these points causes wear and fracture. The fork arms should be equally spaced on the carriage with the fork retaining pins engaged and secure. The forks should be set to the same height. Fork locking pins must latch and be secured into the locked position. Where relevant, hydraulic fork adjustment attachment points must be lubricated, free from damage and correctly secured. Fork guide rollers must not show signs of uneven wear, incorrect tracking, flat spots
Attachment	What should be checked on an attachment?	and scoring. Any attachment fitted must be attached appropriately and securely on the carriage plate (if applicable). Locking pins, welded joints, pivots should not be worn, cracked or seized. The attachment must not be bent, twisted or distorted and must be in good, functional working order.



Pre-use Inspection Show-me-tell-me Questions

Component	Show-me-tell-me	Guidance Notes
Carriage plate	How should you inspect the carriage plate and component parts?	The carriage plate should have no obvious damage and it should sit square to the mast. The end stop bolts must be fitted and secure. The fork locking pins must fully engage into the castellations.
Outer mast	What should you check for on the outer mast?	The outer mast sections should be checked for damage, distortions and cracks. The fitment of the mast to the main body of the lift truck via the pivot bearings and tilt rams should be secure and well lubricated.
Inner mast	What would you check for on the inner mast?	The inner mast channels or runners must be inspected for undue wear, scoring, excessive dirt or any foreign objects or debris, which may be fouling the mechanism. The inner mast must sit squarely inside the outer mast
Mast rollers/slides	How would you inspect the mast rollers/slides?	The mast guide rollers, including reach channel rollers must not show signs of uneven wear, incorrect tracking, flat spots and scoring. Mast slide bearings must be intact and not loose. The bearing must be adequately lubricated.
Lift chains	What should be checked when inspecting the lift chains?	Check lift chains for evidence of deterioration, stretching, loose or worn pins, damaged pin rivet heads. Also check for worn, cracked or missing links and signs of corrosion on link plates. Chain anchor points must be inspected for damage, even adjustment and security of the locking nuts or safety clips.
Chain pulleys	Show me how you would inspect the chain pulleys.	Chain pulleys should have no obvious damage, uneven wear and flat spots. The chains running over pulleys should show signs of tracking correctly between the riveted end of the chain pins and the inner walls of the pulley flanges.

Sample USB Content

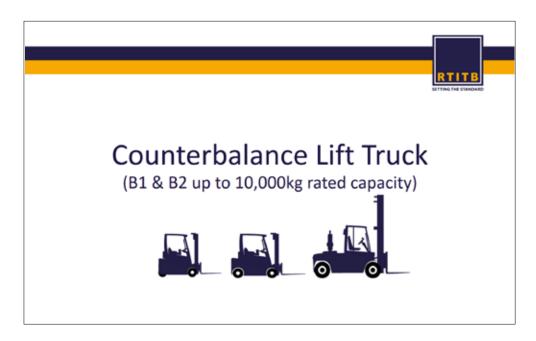
Included with RTITB Trainers Guides is a USB containing a course delivery PowerPoint presentation and candidate handout, supporting articles and documents and prepopulated associated knowledge question papers.

Below is what you will see when you open your USB, some sample slides (in pdf format) and example associated knowledge question paper. Please take a look so that you can compare the quality of our course materials with any others you may be considering for your business.

What you will see when you open up your USB:



Presentation Example Slides:



Presentation Example Slides:







Presentation Example Slides:





Pre-populated Associated Knowledge Question Paper Example:



Associated Knowledge Question Bank 1

B1 (Up to 5,000kg Rated Capacity)

25 Questions

Pass Mark 80%

Time Allowed: 30 Minutes

- 1. This assessment paper consists of **20** multiple-choice questions and **5** open questions.
- 2. All **bold** guestions must be answered correctly.
- **3.** Each correct answer is worth a score of **4** marks.
- **4.** You are advised to attempt all **25** questions.
- **5.** Read each question carefully before answering.
- **6.** Do not use any reference material, confer with other course members, copy any information contained within the examination papers, or ask the instructor for clarification of any questions asked.
- 7. Please ensure that all mobile phones or other communication devices are turned off.
- **8.** The instructor will advise you when there are five minutes of the allocated time remaining.
- **9.** When you have completed the assessment, turn your paper over and wait until advised.
- **10.** If you have any questions, please ask the instructor now.

When the instructor indicates the asssessment has started, turn over the page to begin answering the questions.

Good luck.



Associated Knowledge Question Bank 1

B1 (Up to 5,000kg Rated Capacity)

- 1. Q. Give 4 reasons why a lift truck can tip over sideways (lateral instability).
- 2. Q. Name 4 precautions you must take while refuelling or recharging a lift truck.
- **Q.** State 2 reasons why is it important that loaded pallets are placed tight to one another and against the headboard when loading a lorry.
- **4. Q.** You have a lift truck fitted with a side shift. State 4 hazards this can present.
- **5. Q.** Name 4 precautions you should take as you approach and negotiate blind corners.
- 6. Q. Who is responsible for checking that the lift truck is in good working order before use?
 - A. The management
 - B. The maintenance department
 - **C.** The operator
 - D. The insurer
- 7. Q. The truck's maximum carrying capacity will be reduced when:
 - A. The load centre is increased
 - B. The load centre is decreased
 - C. The load obscures your view
 - D. When travelling in reverse
- 8. Q. Whose responsibility is it to ensure the safety of pedestrians while operating a lift truck?
 - A. The lift truck operator
 - **B.** Management
 - **C.** The pedestrians themselves
 - **D.** The human resources department
- 9. Q. From the list below, select the last thing the operator should do before moving off?
 - A. Put their seat belt on
 - **B.** Engage drive
 - C. Look around
 - D. Sound the horn

Example of supporting material on the USB:



Logistics company fined after driver struck by falling pallet

A logistics company has been fined for safety failings after a driver was injured when he was hit by a pallet that fell from a fork lift truck.

Basildon Crown Court heard how on 19 December 2014, Darren Andrews, a 49-year-old employee of a transport services firm was making a delivery to CWT Commodities (UK) Limited in a lorry. The delivery consisted of a shrink-wrapped pallet of a number of boxes containing castor wheels sitting on top of a wooden case.

A forklift driver employed by CWT Commodities (UK) Limited was offloading the delivery from the lorry's trailer. Having reversed clear of the trailer, the pallet fell to the side of the forklift truck, striking the Mr Andrews as he was standing to the side of the cab watching the operation.

Mr Andrews suffered significant, life threatening injuries as a result of the impact and was airlifted to Royal London Hospital where he stayed for three weeks. He was transferred again to a Bristol hospital for a further week. The incident has had profound and long-term effects on him and he will be unable to return to work as a HGV driver.

Although a risk assessment for the activity had been undertaken, it did not specifically detail a risk to visiting drivers, although it did indicate that the driver should return to his cab, or to stand a 'safe distance' away from the operation.

The Health and Safety Executive (HSE) investigation revealed it was common for visiting drivers to stand next to their cabs or in the vicinity of the forklift truck. The risk assessment identified the risk, but it was not being robustly or consistently implemented.

CWT Commodities (UK) Limited, of Tilbury Docks, Tilbury, Essex was fined a total of £22,000 and ordered to pay £4,639 in costs after pleading guilty to an offence under Section 3(1) of the Health and Safety at Work etc. Act 1974.

For more information about safety in workplace transport log onto the website at; http://www.hse.gov.uk/workplacetransport/index.htm

Source: http://press.hse.gov.uk/2015/%EF%BB%BFlogistics-company-fined-after-driver-struck-by-falling-pallet/