



Risk assessment and method statement

Forklift and telehandler risk assessment

Forklift and telehandler operations. Pre-filled with typical hazards, controls and sequence: edit it for this site.

PROJECT

SITE ADDRESS			
ACTIVITY		RAMS REFERENCE	
Forklift and telehandler operations			
CONTRACTOR CARRYING OUT THE WORK		PRINCIPAL CONTRACTOR	
PREPARED BY	APPROVED BY	REVISION	DATE

Revision record

Reissue and rebrief when the sequence, the programme, the team or the conditions change. If you would have written it differently had you known, it needs a new revision.

REV	DATE	WHAT CHANGED	BY

THE WORK

The activity, the place and the people

Pre-filled for this kind of work. Make every line specific to this site: this sequence, this access, these people, this weather.

Scope of the activity

What is being done, and what is not included.

MHSWR REGULATION 3(1)

Use of [forklifts and telehandlers] at [site] to offload deliveries, move materials and place loads at height, including [suspended loads under a separate lift plan]. Machines: [make, model, attachments]. Heaviest load: [weight]. Not included: [lifts by crane, covered by the lifting operations RAMS].

Location and access

Where on site, how people and materials get there, and the restrictions.

Deliveries via [gate] to the set-down area at [location]. Truck routes, crossings and pedestrian walkways as shown on the site route check and the traffic plan. Overhead lines at [location] marked with goal posts. Working hours [08:00 to 17:00].

Programme and interfaces

When the work runs, and who else is working nearby.

CDM REGULATION 15(2)

START DATE

DURATION

WORKING HOURS

INTERFACES WITH OTHER TRADES

Trades working near truck routes and set-down points: [trades]. Scaffold loading bays shared with [trades]. Delivery times agreed with the site manager. Crane lifts and truck movements in the same area agreed through [name].

Documents this RAMS relies on

Operator training records and written authorisations; thorough examination reports for each machine and attachment; load charts; manufacturer's handbooks; traffic management plan; lift plan for suspended loads [ref]; construction phase plan.

The team, and their competence

CDM REGULATION 8

ROLE	NAME	CARD, TICKET OR TRAINING NEEDED	CONTACT
Operators		Basic, specific job and familiarisation training for the truck type and attachments, with written authorisation.	
Telehandler operators		A recognised card for the category, such as CPCS A17 or NPORS N010, familiarisation on the model, and further training before lifting suspended loads.	
Supervisor		Trained to recognise safe and unsafe practice, as L117 expects, and to monitor operators.	
Lift planner		Competent to plan lifts under LOLER regulation 8, including any suspended load lift.	
Slinger or signaller		Trained for suspended loads and for directing reversing where a signaller is needed.	

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METHOD STATEMENT

The sequence of work

The order the team will work in on the day, with the controls built into each stage. If the sequence changes on site, revise the RAMS and brief it again.

STAGE	WHAT IS DONE, AND HOW	CONTROLS AT THIS STAGE	BY
Plan the work	List the loads, their weights and where they go. Choose the machine and attachments that can do it within their load charts. Plan suspended loads and any work near overhead lines as separate lifts.	Machine suited to the ground and the reach; lift plan for suspended loads; overhead lines found.	Site manager
Check the operators	Check each operator's training records and cards for the truck type and attachments. Give site familiarisation, then written authorisation naming the machines they may use.	Authorisation recorded; trainees only under close supervision; keys issued by the supervisor.	Supervisor
Set out routes and areas	Walk the routes, set-down points and loading bays and complete the route check page. Mark pedestrian routes and crossings, put up barriers and signs, and fix goal posts under overhead lines.	Routes firm, wide and clear overhead; pedestrians separated from trucks; gradients within limits.	Site manager
Brief the team	Brief this assessment to operators, signallers and everyone who works near the trucks: the routes, the exclusion zones, the no passengers rule and how to report a defect.	Briefing signed; site rules for people on foot covered at induction.	Supervisor
Pre-use check	At the start of each shift the operator checks the truck against the handbook: tyres, brakes, steering, forks, chains, hydraulics, seat belt, load indicator, lights and alarms.	Check recorded; defects reported and the truck tagged out until repaired.	Operator
Offload deliveries	Bring the lorry to the set-down point, with brakes on and the driver in a safe place. Check loads for movement before straps come off, then lift each load centred on the forks.	Nobody on the bed while the truck works; set-down area firm and level.	Operator
Move and place loads	Travel with the load low and the boom retracted, at a speed that suits the ground. Raise the load only at the landing point, with the machine level and stabilisers set where fitted.	Load chart followed; load indicator never overridden; exclusion zone below the landing point.	Operator
Suspended loads	Only where the lift plan allows: fit the approved lifting attachment, sling the load with a trained slinger, lift a little and pause to check balance, then place it with the load steadied.	Attachment examined and in date; load chart for the attachment in the cab; nobody under the load or in front of the machine.	Lift supervisor
Refuel, charge and park	Refuel outside with the engine off, or charge in the designated area. At the end of the shift park on level ground, lower the forks, apply the brake, stop the engine and return the keys.	No smoking at fuel and charging points; spill kit and extinguisher to hand; keys held securely.	Operator
Monitor and review	Watch how trucks and people share the site, and act on near misses. Update the assessment when the layout, the machines, the operators or the work change.	Unsafe practice corrected and retraining arranged; review recorded.	Site manager

CDM REGULATION 15(2): PLAN, MANAGE AND MONITOR THE WORK

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RISK ASSESSMENT

Hazards, controls and the risk that remains

Each significant hazard rated before and after its controls, as likelihood times severity. The ratings are typical: check them for this site.

	LIKELIHOOD		SEVERITY		
	1	2	3	4	5
5	5	10	15	20	25
4	4	8	12	16	20
3	3	6	9	12	15
2	2	4	6	8	10
1	1	2	3	4	5
	1	2	3	4	5

1 to 4 low
 5 to 12 medium
 15 to 25 high

HAZARD	WHO COULD BE HARMED, AND HOW	RISK BEFORE	CONTROLS	RISK AFTER	BY
Untrained or unauthorised operators	Anyone who drives a truck without training for that type, and the people around them.	3 x 5 = 15 High	- Basic, specific job and familiarisation training to HSE L117 for each truck type and attachment; conversion training for a new type. - Written authorisation for each operator, naming the truck types; telehandler cards checked, such as CPCS A17 or NPORS N010. - Keys or keypads controlled by the supervisor, so nobody else can start the truck.	1 x 5 = 5 Med	Site manager
People on foot struck by a truck	Operatives, visitors and delivery drivers walking where trucks work, load and turn.	4 x 5 = 20 High	- Pedestrians kept out of truck working areas where possible; physical barriers between walkways and routes. - Marked crossing points, pedestrian gates set back from vehicle routes, and warning signs at every entrance. - Operators stop when anyone on foot comes close, and nobody walks under a raised load or boom.	2 x 5 = 10 Med	Site manager
Reversing and blind spots	Anyone behind or beside a telehandler, whose boom and engine block the operator's view.	4 x 5 = 20 High	- Routes laid out to cut reversing, with one-way systems and turning areas. - Mirrors, cameras, reversing alarms and beacons working, checked each shift. - A trained signaller only where reversing cannot be avoided, standing in a safe place in the operator's view.	2 x 5 = 10 Med	
Sideways overturning	Operators thrown from the cab when a truck turns, crosses a slope or drops a wheel into a hole.	3 x 5 = 15 High	- No travelling or turning across a slope; gradients kept within the manufacturer's maximum. - Loads carried low, boom retracted, and speed suited to the ground; potholes and trench edges barriered. - Seat belt worn wherever one is fitted, so the operator stays inside the protective cab.	1 x 5 = 5 Med	Operator
Forward tipping from overload or reach	Operators and people nearby when a telehandler lifts too much at too great a reach.	3 x 5 = 15 High	- Load weight known before the lift and checked against the load chart for the attachment, at the reach and height needed. - Load moment indicator or control tested at the start of the shift and never overridden. - Stabilisers set on firm ground where fitted; machine level before the boom is raised.	1 x 5 = 5 Med	Operator
Falling loads	People near stacks, scaffold loading bays and set-down points when a load slips or is dropped.	3 x 4 = 12 Med	- Loads banded, palletised and centred on the forks, with the forks spread to suit the pallet. - Mast or forks tilted back to travel; loads raised only at the stack or landing point. - Exclusion zone below loads being placed at height; loading bays with gates kept shut until the load lands.	2 x 4 = 8 Med	
Telehandler lifting suspended loads	Slings and people nearby when a telehandler lifts on a hook, jib or slings.	3 x 5 = 15 High	- Only a designed, examined lifting attachment fitted to the machine, with its own load chart; never chains or slings over the forks or carriage. - Lift planned under LOLER regulation 8; operator trained for suspended loads; trained slinger. - Travel only where the maker allows it: load low, slow, and nobody walking in front to steady it.	1 x 5 = 5 Med	Lift planner
Lifting people	Anyone lifted on the forks, on a pallet or in a cage on a forklift or telehandler.	3 x 5 = 15 High	- Nobody lifted on the forks or on a pallet, ever. - MEWPs chosen for work at height; an integrated working platform only where the truck and platform are made for it. - Non-integrated platforms kept to the exceptional, unplanned uses L117 describes, never routine work.	1 x 5 = 5 Med	

MHSWR REGULATION 3(6): WITH FIVE OR MORE EMPLOYEES, RECORD THE SIGNIFICANT FINDINGS

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RISK ASSESSMENT, CONTINUED

More hazards, and those specific to this site

HAZARD	WHO COULD BE HARMED, AND HOW	RISK BEFORE	CONTROLS	RISK AFTER	BY
Overhead power lines and obstructions	Operators and slingers when a raised boom or mast touches a line, beam or doorway.	2 x 5 = 10 Med	- Overhead lines identified at the planning stage; the network operator asked to divert or make them dead where work is close. - Goal posts and signs on routes under lines; booms lowered before passing beneath. - Height and clearance of doorways, beams and scaffold checked on the route survey.	1 x 5 = 5 Med	
Defects on the machine	Operators and others when brakes, tyres, forks, chains or hydraulics fail in use.	3 x 4 = 12 Med	- Documented pre-use check at the start of each shift, following the handbook, with defects reported at once. - Truck taken out of use and tagged until a defect that affects safety is put right. - Planned maintenance by trained people; thorough examination report in date and kept on site.	1 x 4 = 4 Low	Operator
Loading and unloading lorries	Lorry drivers and operatives at the set-down point, and anyone on the lorry bed.	3 x 4 = 12 Med	- Lorry parked on firm, level ground with brakes on; driver in a safe place in view, off the bed while loading. - Loads checked for movement before straps are released, from the ground or a platform. - Curtain-siders and trailers assessed for the truck going out of control, as L117 advises.	2 x 4 = 8 Med	Supervisor
Soft ground, trenches and edges	Operators when a wheel sinks, an edge gives way or the truck runs into an excavation.	3 x 5 = 15 High	- Routes kept firm and maintained; soft spots, covers and voids marked or kept clear. - Stop blocks or barriers at excavation and embankment edges where trucks tip or set down near them. - Rough terrain machines only for unmade ground; industrial trucks kept to hard surfaces.	1 x 5 = 5 Med	
Passengers and riding on the truck	Anyone given a lift on the step, the forks or a load.	3 x 4 = 12 Med	- Nobody rides on a truck except in a safe place provided for that purpose, as CDM regulation 28 requires. - Rule briefed at induction and enforced by supervisors.	1 x 4 = 4 Low	
Refuelling with diesel or LPG	Operators refuelling or changing gas cylinders, and anyone nearby if fuel catches fire.	2 x 4 = 8 Med	- Refuelling outside, engine off, away from drains and pits, with no smoking and signs displayed. - LPG cylinders changed outside, away from drains and ignition sources, with glasses, gloves and boots worn. - Spill kit and fire extinguisher at the fuel point; fuel stored in a bunded, secure area.	1 x 4 = 4 Low	
Battery charging	Operators charging electric trucks, from hydrogen gas and battery acid.	2 x 4 = 8 Med	- Charging in a designated, well-ventilated area where smoking, naked flames and mobile phones are not allowed. - Charger switched off before the lead is connected or removed; electrolyte topped up to the maker's level. - Acid-proof apron, gloves and eye protection for battery care; eyewash to hand.	1 x 4 = 4 Low	
Unattended trucks and exhaust fumes	Anyone near a truck left running, left raised, or used indoors with poor ventilation.	3 x 3 = 9 Med	- Parked on level ground, parking brake on, forks or attachment lowered, engine off and keys returned. - Engine trucks not used in confined spaces or poorly ventilated areas; electric trucks indoors where possible. - Exhaust filters, where fitted, checked; ventilation kept as the main control.	1 x 3 = 3 Low	

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EQUIPMENT

Plant, equipment and PPE

Plant and equipment

Each item, the checks and certificates it needs, and who may operate it.

PUWER 1998, LOLER 1998

ITEM	CHECKS AND CERTIFICATES	OPERATOR COMPETENCE
Forklift or telehandler	Pre-use check each shift; thorough examination at least every 12 months.	Trained and authorised
Fork-mounted hook, jib or crane attachment	Approved for the machine; load chart in the cab; examined under LOLER.	Trained operator
Slings, chains and shackles	Marked with safe working load; pre-use check; examined every 6 months.	Trained slinger
Integrated working platform	Made for the machine; examined every 6 months; controls tested.	Trained operator
Battery charger and charging area	Ventilated; charger and leads checked; eyewash and PPE to hand.	Trained user
Fuel and LPG storage	Bunded and secure; spill kit and extinguisher; signs displayed.	Trained user

Personal protective equipment

PPE is the last line of defence, after the controls above. Specify the type, not just the item.

PPE AT WORK REGULATIONS 1992

ITEM	NEEDED	TYPE AND SPECIFICATION
Safety helmet	☒	To site standard
Safety footwear	☒	Toe protection and a grip sole
High-visibility clothing	☒	All on foot; operators out of the cab
Gloves	☒	For slinging, refuelling and banding
Eye protection	☒	Battery care and gas cylinder changes
Hearing protection	☐	
Respiratory protection Type, and face-fit tested	☐	
Harness or restraint Anchor points identified	☐	

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CONTROLS

Substances, permits, emergencies and the environment

Hazardous substances

Each substance and its COSHH assessment.

COSHH 2002, REGULATION 6

SUBSTANCE	COSHH ASSESSMENT REFERENCE	CONTROLS
Diesel	COSHH assessment ref	Refuel outside, engine off; gloves; spill kit to hand
LPG	COSHH assessment ref	Change cylinders outside, away from drains; glasses and gloves
Battery acid and electrolyte	COSHH assessment ref	Acid-proof apron, gloves and eye protection; eyewash to hand
Hydraulic oil	COSHH assessment ref	Gloves; leaks reported; spill kit to hand

Permits and plans

PERMIT OR PLAN	NEEDED	REFERENCE
Hot work permit	☐	
Permit to work	☒	
Permit to dig or break ground	☐	
Confined space entry	☐	
Lift plan	☒	
Temporary works design	☐	

Emergency and rescue

First aid, fire, and how someone is rescued.
The rescue plan belongs in the RAMS, not after it.

If a truck overturns, stay in the seat with the belt on and hold on. Call the first aider and emergency services, and isolate the machine. Overhead line contact: stay in the cab, warn others away, call the network operator. An overturn, failure of a load-bearing part, or contact with a bare line over 200 volts is a RIDDOR dangerous occurrence.

Environment and neighbours

Dust, noise, vibration, waste, spills and hours of work.

Fuel stored in a bunded, secure area, with spill kits at the fuel point. Leaks of fuel or hydraulic oil cleaned up at once and reported. Engines switched off when not in use. Deliveries timed so lorries do not block neighbours or the highway.

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SITE ROUTE AND PRE-USE CHECK

Truck routes and machine checks

Walk the routes before work starts, then check the machine at the start of each shift. The example findings are for a telehandler on a housing site: replace them with what you find.

CHECK	WHAT TO LOOK FOR	FINDING	OK OR DEFECT	ACTION AND BY WHOM
Route surface	Firm and level? Potholes, loose material, soft ground or trench edges beside the route?	Haul road firm; soft verge beside the drainage trench at plot 4.	Defect	Barrier on the trench edge before work. Site manager.
Gradients	Within the maker's maximum? Any travel or turning across a slope?	Ramp to the compound within the limit; no cross-slope travel.	OK	None.
People on foot	Walkways and crossings marked and barriered? Gates set back from the route?	Welfare cabin door opens straight onto the haul road.	Defect	Barrier and marked crossing outside the cabin. Supervisor.
Overhead	Overhead lines, scaffold, beams or doorways on the route or at set-down?	Overhead line crosses the east access road.	Defect	Goal posts and signs either side; boom lowered. Supervisor.
Set-down and loading bays	Firm, level and big enough? Lorries braked? Loading bay gates working?	Set-down area firm; loading bay gate on scaffold lift 2 sticking.	Defect	Scaffolder to repair the gate today.
Fuel and charging point	Outside or ventilated, away from drains? No smoking signs? Spill kit and extinguisher?	Fuel bowser bunded; spill kit present.	OK	None.
Tyres and wheels	Cuts, bulges or embedded material? Pressures correct? Wheel nuts tight?	[Finding]		
Brakes and steering	Service and parking brakes hold? Steering responds correctly?	[Finding]		
Forks, chains and boom	Cracks at fork heels and hooks? Fork locks in place? Chains, pins and boom wear?	[Finding]		
Hydraulics and fluids	Leaks? Fuel, oil, coolant and hydraulic levels? Battery charged and lead stored?	[Finding]		
Seat belt and cab	Seat belt works? Cab guard, glass and mirrors sound and clean?	[Finding]		
Load indicator and warnings	Load moment indicator tested? Horn, beacon, reversing alarm and lights working?	[Finding]		
Paperwork	Thorough examination report in date? Load chart for the attachment in the cab?	[Finding]		

HSE L117 (2013), PARAGRAPHS 121 TO 126 AND 161 TO 162; CDM 2015, REGULATION 27; LOLER 1998, REGULATION 9

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Briefed before the work starts

BRIEFED BY	REVISION BRIEFED	DATE AND TIME

[illegible]

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