



**Australian Government**

**Department of Education, Employment and Workplace Relations**

# **TLID2010A Operate a forklift**

**Release: 1**

## **TLID2010A Operate a forklift**

### **Modification History**

Not Applicable

### **Unit Descriptor**

#### **Unit Descriptor**

This unit involves the skills and knowledge required to operate a forklift, including checking forklift condition, driving the forklift to fulfil operational requirements, monitoring site conditions, and monitoring and maintaining forklift performance. Assessment of this unit will usually be undertaken within a licensing examination conducted by, or under the authority of, the relevant state/territory OH&S authority. Licensing, legislative, regulatory or certification requirements are applicable to this unit.

### **Application of the Unit**

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Operation of a forklift must be carried out in compliance with the licence requirements and regulations of the relevant state/territory authority.

Operation of a forklift is performed under some supervision, generally within a team environment. It involves the application of routine equipment operation principles and procedures to maintain the safety and operation of a forklift in a variety of operational contexts.

### **Licensing/Regulatory Information**

Refer to Unit Descriptor

### **Pre-Requisites**

Not Applicable

## **Employability Skills Information**

**Employability Skills**                      This unit contains employability skills.

## **Elements and Performance Criteria Pre-Content**

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Assessment of performance is to be consistent with the evidence guide.

## Elements and Performance Criteria

### ELEMENT

### PERFORMANCE CRITERIA

- |  |   |
|--|---|
| <b>1 Check forklift condition</b>                  | <ul style="list-style-type: none"><li>1.1 Condition of forklift is checked for compliance with OH&amp;S and workplace requirements for warning devices, manufacturers specifications and the nature of the load shifting task</li><li>1.2 Attachments are checked to ensure appropriate adjustment and operation</li><li>1.3 Mirrors and seats are adjusted for safe operation by the driver</li><li>1.4 Log books are checked and appropriate workplace documentation is completed in accordance with workplace requirements</li></ul>   |
| <b>2 Drive the forklift</b>                        | <ul style="list-style-type: none"><li>2.1 Forklift is started, steered, manoeuvred, positioned and stopped in accordance with regulations and manufacturers instructions</li><li>2.2 Engine power is managed to ensure efficiency and performance and to minimise engine and gear damage</li><li>2.3 Operational hazards are identified and/or anticipated and avoided or controlled through defensive driving and appropriate hazard control techniques</li><li>2.4 Forklift is driven in reverse, maintaining visibility and achieving accurate positioning</li><li>2.5 The forklift is parked, shut down and secured in accordance with manufacturers specifications, regulations and workplace procedures</li></ul> |
| <b>3 Operate a forklift to handle loads</b>        | <ul style="list-style-type: none"><li>3.1 The lifting task to be undertaken is appropriately planned and the correct lifting truck and attachments are selected</li><li>3.2 The load is lifted, carried, lowered and set down in accordance with OH&amp;S legislation, manufacturers specifications and company procedures</li></ul>  |
| <b>4 Monitor site conditions</b>                   | <ul style="list-style-type: none"><li>4.1 When selecting the most efficient route, hazards and traffic flow are identified and appropriate adjustments are made</li><li>4.2 Site conditions are assessed to enable safe operations and to ensure no injury to people or damage to property, equipment, loads or facilities occurs</li></ul>   |
| <b>5 Monitor and maintain forklift performance</b> | <ul style="list-style-type: none"><li>5.1 Performance and efficiency of vehicle operation is monitored during use</li><li>5.2 Defective/irregular performance and malfunctions reported to relevant personnel</li><li>5.3 Forklift records are maintained/updated in accordance with workplace procedures and legislative requirements</li></ul>  |

## **Required Skills and Knowledge**

### **REQUIRED KNOWLEDGE AND SKILLS**

This describes the essential knowledge and skills and their level required for this unit.

#### **Required knowledge:**

- Relevant duty of care requirements pertaining to the operation of a forklift
- Relevant OH&S and environmental procedures and regulations
- Workplace operating procedures
- Forklift controls, instruments and indicators and their use
- Forklift handling procedures
- Procedures to be followed in the event of an operational emergency
- Engine power management and safe operating strategies
- Efficient driving techniques
- Operating hazards and related defensive driving and hazard control techniques
- Pre-operational checks carried out on forklift and related action
- Principles of stress management when driving a forklift
- Site layout and obstacles

#### **Required skills:**

- Communicate effectively with others when operating a forklift
- Read and interpret instructions, procedures, information and signs relevant to the operation of a forklift
- Interpret and follow operational instructions and prioritise work
- Complete documentation related to the operation of a forklift
- Operate electronic communication equipment to required protocol
- Work collaboratively with others when operating a forklift
- Adapt appropriately to cultural differences in the workplace, including modes of behaviour and interactions with others
- Promptly report and/or rectify any identified problems, faults or malfunctions in accordance with regulatory requirements and workplace procedures
- Implement contingency plans for unexpected events when operating a forklift
- Apply precautions and required action to minimise, control or eliminate hazards that may exist during the operation of a forklift
- Monitor work activities in terms of planned schedule
- Modify activities depending on differing operational contingencies, risk situations and environments
- Apply fatigue management knowledge and techniques

**Required skills:**

- Work systematically with required attention to detail without injury to self or others, or damage to goods or equipment
- Operate and adapt to differences in equipment in accordance with standard operating procedures
- Select and use required personal protective equipment conforming to industry and OH&S standards
- Identify points of balance and safe lifting positions on a range of loads when operating a forklift (including accessories)
- Monitor performance of forklift and its equipment and take appropriate action where required
- Ensure that a forklift and its equipment are maintained in terms of service schedule and standard operating procedures
- Check and replenish fluids and carry out lubrication processes in the course of work activities

**Evidence Guide****EVIDENCE GUIDE**

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required knowledge and skills, the range statement and the assessment guidelines for this Training Package.

**Critical aspects for assessment and evidence required to demonstrate competency in this unit**

- The evidence required to demonstrate competency in this unit must be relevant to and satisfy all of the requirements of the elements and performance criteria of this unit and include demonstration of applying:
  - the underpinning knowledge and skills
  - relevant legislation and workplace procedures
  - other relevant aspects of the range statement

**Context of and specific resources for assessment**

- Performance is demonstrated consistently over a period of time and in a suitable range of contexts
- Resources for assessment include:
  - a range of relevant exercises, case studies and/or other simulated practical and knowledge assessment, and/or
  - access to an appropriate range of relevant operational situations in the workplace
- In both real and simulated environments, access is required to:
  - relevant and appropriate materials and equipment, and

## EVIDENCE GUIDE

	<ul style="list-style-type: none"><li>• applicable documentation including workplace procedures, regulations, codes of practice and operation manuals</li></ul>
<b>Method of assessment</b>	<ul style="list-style-type: none"><li>• Assessment of this unit must be undertaken by a registered training organisation</li><li>• As a minimum, assessment of knowledge must be conducted through appropriate written/oral tests</li><li>• Practical assessment must occur:<ul style="list-style-type: none"><li>• through activities in an appropriately simulated environment at the registered training organisation, and/or</li><li>• in an appropriate range of situations in the workplace</li></ul></li></ul>

## Range Statement

### RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance.

Types of forklift may include:	<ul style="list-style-type: none"><li>• counterbalance trucks</li><li>• reach trucks</li><li>• pallet trucks</li></ul>
Operations may be carried out in typical forklift operational situations, including:	<ul style="list-style-type: none"><li>• operations conducted at day or night</li><li>• typical weather conditions</li><li>• on the open road</li><li>• on a private road or worksite</li><li>• while at a workplace</li></ul>
Customers may be:	<ul style="list-style-type: none"><li>• internal or external</li></ul>
Workplaces may comprise:	<ul style="list-style-type: none"><li>• large, medium or small worksites</li></ul>
Work may be conducted in:	<ul style="list-style-type: none"><li>• restricted spaces</li><li>• exposed conditions</li><li>• controlled or open environments</li></ul>
Loads to be shifted may require:	<ul style="list-style-type: none"><li>• special precautions</li></ul>
Loads to be shifted may be:	<ul style="list-style-type: none"><li>• irregularly shaped</li><li>• packaged or unpackaged</li><li>• labelled or unlabelled</li><li>• palletted or unpalletted</li></ul>

## RANGE STATEMENT

Hazards in the work area may include exposure to:

- chemicals
- dangerous or hazardous substances
- movements of equipment, goods and materials

Personnel in the work area may include:

- workplace personnel
- site visitors
- contractors
- official representatives

Forklift handling procedures may include:

- starting a forklift
- steering and manoeuvring a forklift
- accelerating and braking
- positioning and stopping a forklift
- reversing a forklift
- operating forklift controls, instruments and indicators
- using defensive driving techniques
- managing engine performance

Pre-operational checks may include:

- visual check of forklift
- checking and topping up of fluid levels
- checks of tyres
- checks of operation of forklift lights and indicators
- checks of brakes

Hazards may include (examples only):

- wet and iced operating surfaces
- oil on operating surface
- faulty brakes
- workplace obstacles and other operational equipment and vehicles
- damaged loads and pallets
- other personnel in work area

Depending on the type of organisation concerned and the local terminology used, workplace procedures may include:

- company procedures
- enterprise procedures
- organisational procedures
- established procedures

Personal protection equipment may include:

- gloves
- safety headwear and footwear
- safety glasses
- two-way radios
- high visibility clothing

Information/documents may include:

- goods identification numbers and codes, including IMDG markings and HAZCHEM signs
- manifests, bar codes, picking slips, merchandise transfers, stock requisitions, goods and container identification



## RANGE STATEMENT

- Applicable procedures and codes may include:
- Australian Standard 2359 - Industrial Truck Code
  - manufacturers specifications for forklift and associated equipment
  - operations and service record book or log
  - workplace procedures and policies for the operation of forklifts
  - supplier and/or client instructions
  - ADG Code and material safety data sheets
  - regulatory requirements concerning the use of forklifts
  - award, enterprise bargaining agreement, other industrial arrangements
  - standards and certification requirements
  - quality assurance procedures
  - emergency procedures
  - relevant state/territory regulations pertaining to the operation of forklifts
  - relevant codes and standards, including Australian Standard 2359 - Industrial Truck Code
  - relevant state/territory OH&S legislation
  - relevant state/territory fatigue management regulations
  - relevant state/territory environmental protection legislation

## Unit Sector(s)

Not Applicable

## Competency Field

**Competency Field** D - Load Handling