



Australian Government

Department of Education, Employment and Workplace Relations

TDTD1097B Operate a forklift

Release: 1

TDTD1097B Operate a forklift

Modification History

Not applicable.

Unit Descriptor

Field D Load Handling

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 OHS Authority.

Persons achieving competence in this unit will need to fulfil all of the relevant State/Territory OHS regulatory requirements concerning the safe operation of forklifts

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Persons achieving competence in this unit will need to fulfil all of the relevant State/Territory OHS regulatory requirements concerning the safe operation of forklifts

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Not applicable.

Employability Skills Information

Not applicable.

Elements and Performance Criteria Pre-Content

Not applicable.

Elements and Performance Criteria

Elements and Performance Criteria

Element	Performance Criteria
1 Check forklift condition	1.1 Condition of forklift is checked for compliance with OHS and workplace requirements for warning devices, manufacturer's specifications and the nature of the load shifting task 1.2 Attachments are checked to ensure appropriate adjustment and operation 1.3 Mirrors and seats are adjusted for safe operation by the driver 1.4 Log books are checked and appropriate workplace documentation is completed in accordance with workplace requirements
2 Drive the forklift	2.1 Forklift is started, steered, manoeuvred, positioned and stopped in accordance with regulations and manufacturer's instructions 2.2 Engine power is managed to ensure efficiency and performance and to minimise engine and gear damage 2.3 Operational hazards are identified and/or anticipated and avoided or controlled through defensive driving and appropriate hazard control techniques 2.4 Forklift is driven in reverse, maintaining visibility and achieving accurate positioning 2.5 The forklift is parked, shut down and secured in accordance with manufacturer's specifications, regulations and workplace procedures

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| 3 | Operate a forklift to handle loads | 3.1 The lifting task to be undertaken is appropriately planned and the correct lifting truck and attachments are selected |
| | | 3.2 The load is lifted, carried, lowered and set down in accordance with OHS legislation, manufacturer's specifications and company procedures |
| 4 | Monitor site conditions | 4.1 When selecting the most efficient route, hazards and traffic flow are identified and appropriate adjustments are made |
| | | 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 |
| 5 | Monitor and maintain forklift performance | 5.1 Performance and efficiency of vehicle operation is monitored during use |
| | | 5.2 Defective/irregular performance and malfunctions reported to relevant personnel |
| | | 5.3 Forklift records are maintained/updated in accordance with workplace procedures and legislative requirements |

Required Skills and Knowledge

Not applicable.

Evidence Guide

Critical aspects of evidence to be considered

- a. Assessment must confirm appropriate knowledge and skills to:
 - a.1. operate a forklift safely in a workplace environment
 - a.2. handle loads and drive defensively
 - a.3. manage forklift controls, read instruments and adjust engine power to site requirements
 - a.4. locate, interpret and apply relevant information
 - a.5. carry out pre-operational checks on a forklift
 - a.6. work effectively with colleagues
 - a.7. convey information in written and oral form
 - a.8. maintain workplace records
 - a.9. use workplace colloquial and technical language and communication technologies in the workplace context
 - a.10. meet relevant regulatory requirements

Interdependent assessment of units

- a. This unit of competency may be assessed in conjunction with other units that are part of a worker's job function

Required knowledge and skills

- a. Knowledge of relevant duty of care requirements pertaining to the operation of a forklift
- b. Relevant OHS and environmental procedures and regulations
- c. Forklift controls, instruments and indicators and their use
- d. Forklift handling procedures
- e. Procedures to be followed in the event of an operational emergency
- f. Engine power management and safe operating strategies
- g. Efficient driving techniques
- h. Pre-operational checks carried out on forklift and related action
- i. Site layout and obstacles
- j. Operating hazards and related defensive driving and hazard control techniques
- k. Principles of stress management when driving a forklift
- l. Workplace operating procedures
- m. Ability to identify points of balance and safe lifting positions on a range of loads when operating a forklift
- n. Ability to read instructions, procedures and signage relevant to the operation of a forklift
- o. Ability to monitor and anticipate operational hazards and take appropriate action

Resource implications

- a. Access is required to opportunities to:
 - a.1. participate in a range of exercises, case studies and other real or simulated practical and knowledge assessments that demonstrate the skills and knowledge to operate a forklift to carry out a range of load shifting operations in a workplace, and/or
 - a.2. operate a forklift to shift loads in an appropriate range of operational situations

Consistency in performance

- a. Applies underpinning knowledge and skills when:
 - a.1. operating a forklift safely in workplace environment
 - a.2. handling loads and driving defensively
 - a.3. managing forklift controls, reading instruments and adjusting engine power to site requirements
 - a.4. locating, interpreting and applying relevant information

- a.5. carrying out pre-operational checks
- a.6. working effectively with colleagues
- a.7. conveying information in relevant form
- a.8. maintaining workplace records
- b. Shows evidence of application of relevant workplace procedures including:
 - b.1. relevant State/Territory regulations and licence requirements pertaining to forklift operation
 - b.2. OHS policies and procedures
 - b.3. identification of operational hazards and the use of appropriate defensive driving and hazard control techniques
 - b.4. workplace procedures and work instructions (including security and housekeeping procedures)
 - b.5. forklift manufacturer's guidelines and instructions
 - b.6. environmental protection procedures when operating a forklift and carrying out pre-operational checks
- c. Action is taken promptly to report and/or rectify accidents, incidents and any identified faults or malfunctions in accordance with manufacturer's instructions, regulatory requirements and workplace procedures
- d. Performance is demonstrated consistently over a period of time and in a suitable range of contexts
- e. Work is completed systematically with required attention to detail and without injury to self or others or damage to goods or equipment

Context for assessment

- a. Assessment of competence must comply with the assessment requirements of the relevant State/Territory forklift licensing authority
- b. Assessment of this unit must be undertaken by a Registered Training Organisation:
 - b.1. As a minimum, assessment of knowledge must be conducted through appropriate oral and/or written questioning
 - b.2. Appropriate practical assessment must occur:
 - b.2.1. at the Registered Training Organisation, and/or
 - b.2.2. in an appropriate work situation

Critical aspects of evidence to be considered

- a. Assessment must confirm appropriate knowledge and skills to:
 - a.1. operate a forklift safely in a workplace environment
 - a.2. handle loads and drive defensively
 - a.3. manage forklift controls, read instruments and adjust engine power to site requirements
 - a.4. locate, interpret and apply relevant information
 - a.5. carry out pre-operational checks on a forklift
 - a.6. work effectively with colleagues
 - a.7. convey information in written and oral form
 - a.8. maintain workplace records
 - a.9. use workplace colloquial and technical language and communication technologies in the workplace context
 - a.10. meet relevant regulatory requirements

Interdependent assessment of units

- a. This unit of competency may be assessed in conjunction with other units that are part of a worker's job function

Required knowledge and skills

- a. Knowledge of relevant duty of care requirements pertaining to the operation of a forklift
- b. Relevant OHS and environmental procedures and regulations
- c. Forklift controls, instruments and indicators and their use
- d. Forklift handling procedures
- e. Procedures to be followed in the event of an operational emergency
- f. Engine power management and safe operating strategies
- g. Efficient driving techniques
- h. Pre-operational checks carried out on forklift and related action
- i. Site layout and obstacles
- j. Operating hazards and related defensive driving and hazard control techniques
- k. Principles of stress management when driving a forklift
- l. Workplace operating procedures
- m. Ability to identify points of balance and safe lifting positions on a range of loads when operating a forklift
- n. Ability to read instructions, procedures and signage relevant to the operation of a forklift
- o. Ability to monitor and anticipate operational hazards and take appropriate action

Resource implications

- a. Access is required to opportunities to:

- a.1. participate in a range of exercises, case studies and other real or simulated practical and knowledge assessments that demonstrate the skills and knowledge to operate a forklift to carry out a range of load shifting operations in a workplace, and/or
- a.2. operate a forklift to shift loads in an appropriate range of operational situations

Consistency in performance

- a. Applies underpinning knowledge and skills when:

- a.1. operating a forklift safely in workplace environment
- a.2. handling loads and driving defensively
- a.3. managing forklift controls, reading instruments and adjusting engine power to site requirements
- a.4. locating, interpreting and applying relevant information
- a.5. carrying out pre-operational checks
- a.6. working effectively with colleagues
- a.7. conveying information in relevant form
- a.8. maintaining workplace records
- b. Shows evidence of application of relevant workplace procedures including:
 - b.1. relevant State/Territory regulations and licence requirements pertaining to forklift operation
 - b.2. OHS policies and procedures
 - b.3. identification of operational hazards and the use of appropriate defensive driving and hazard control techniques
 - b.4. workplace procedures and work instructions (including security and housekeeping procedures)
 - b.5. forklift manufacturer's guidelines and instructions
 - b.6. environmental protection procedures when operating a forklift and carrying out pre-operational checks
- c. Action is taken promptly to report and/or rectify accidents, incidents and any identified faults or malfunctions in accordance with manufacturer's instructions, regulatory requirements and workplace procedures

- d. Performance is demonstrated consistently over a period of time and in a suitable range of contexts
- e. Work is completed systematically with required attention to detail and without injury to self or others or damage to goods or equipment

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- a. Assessment of competence must comply with the assessment requirements of the relevant State/Territory forklift licensing authority
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 - b.2. Appropriate practical assessment must occur:
 - b.2.1. at the Registered Training Organisation, and/or
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Range Statement

General context

- a. Operation of a forklift must be carried out in compliance with the licence requirements and regulations of the relevant State/Territory authority
- b. Operation of a forklift is performed under some supervision, generally within a team environment
- c. Operation of a forklift 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

Worksite environment

- a. Types of forklift may include counterbalance trucks, reach trucks and pallet trucks
- b. Operations may be carried out in typical forklift operational situations, including:
 - b.1. operations conducted at day or night
 - b.2. typical weather conditions
 - b.3. on the open road
 - b.4. on a private road or worksite
 - b.5. while at a workplace
- c. Customers may be internal or external
- d. Workplaces may comprise large, medium or small worksites
- e. Work may be conducted in:
 - e.1. restricted spaces
 - e.2. exposed conditions
 - e.3. controlled or open environments
- f. Loads to be shifted may require special precautions
- g. Loads to be shifted may be:
 - g.1. irregularly shaped
 - g.2. packaged or unpackaged
 - g.3. labelled or unlabelled
 - g.4. palletted or unpalletted
- h. Hazards in the work area may include exposure to:
 - h.1. chemicals
 - h.2. dangerous or hazardous substances
 - h.3. movements of equipment, goods and materials
- i. Personnel in the work area may include:
 - i.1. workplace personnel
 - i.2. site visitors
 - i.3. contractors
 - i.4. official representatives
- j. Forklift handling procedures may include:
 - j.1. starting a forklift
 - j.2. steering and manoeuvring a forklift
 - j.3. accelerating and braking
 - j.4. positioning and stopping a forklift
 - j.5. reversing a forklift
 - j.6. operating forklift controls, instruments and indicators
 - j.7. using defensive driving techniques
 - j.8. managing engine performance

k. Pre-operational checks may include:

- k.1. visual check of forklift
- k.2. checking and topping up of fluid levels
- k.3. checks of tyres
- k.4. checks of operation of forklift lights and indicators
- k.5. checks of brakes

l. Hazards may include (examples only):

- l.1. wet and iced operating surfaces
- l.2. oil on operating surface
- l.3. faulty brakes
- l.4. workplace obstacles and other operational equipment and vehicles
- l.5. damaged loads and pallets
- l.6. other personnel in work area

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

- m.1. company procedures
- m.2. enterprise procedures
- m.3. organisational procedures
- m.4. established procedures

n. Personal protection equipment may include:

- n.1. gloves
- n.2. safety headwear and footwear
- n.3. safety glasses
- n.4. two-way radios
- n.5. high visibility clothing

Sources of information/documents

a. Information/documents may include:

- a.1. goods identification numbers and codes, including IMDG markings and HAZCHEM signs
- a.2. manifests, bar codes, picking slips, merchandise transfers, stock requisitions, goods and container identification
- a.3. Australian Standard 2359 - Industrial Truck Code
- a.4. manufacturer's specifications for forklift and associated equipment
- a.5. operations and service record book or log
- a.6. workplace procedures and policies for the operation of forklifts
- a.7. supplier and/or client instructions
- a.8. ADG Code and material safety data sheets
- a.9. regulatory requirements concerning the use of forklifts
- a.10. award, enterprise bargaining agreement, other industrial arrangements
- a.11. standards and certification requirements
- a.12. quality assurance procedures
- a.13. emergency procedures

Applicable regulations and legislation

a. Applicable procedures and codes may include:

- a.1. relevant State/Territory regulations pertaining to the operation of forklifts
- a.2. relevant codes and standards, including Australian Standard 2359 - Industrial Truck Code
- a.3. relevant State/Territory OHS legislation
- a.4. relevant State/Territory fatigue management regulations

a.5. relevant State/Territory environmental protection legislation

General context

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

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 - a.4. relevant State/Territory fatigue management regulations
 - a.5. relevant State/Territory environmental protection legislation

Unit Sector(s)

Not applicable.