RIIHAN201E: Operate a Forklift

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ACME Skills Institute

SECTION

Session 1 — Preparing for Operations

- Understand work requirements and documentation
- Identify and control hazards
- Select correct PPE
- Understand forklift attachments and capacities
- Communicate with others on site

SPEAKER NOTES

This first session is all about preparation. A safe lift starts long before you turn the key. We'll cover how to plan your work, identify risks, and ensure you have the right gear for the job. Proper planning prevents poor performance and, more importantly, accidents. (Covers Element 1). Timing: ~5 mins.

Planning the Job

- Accessing job documentation
- Interpreting work orders and plans
- Confirming requirements with supervisors
- Understanding site rules and procedures
- Applying for necessary permits

SPEAKER NOTES

First, you need to understand the task. This means reviewing documents like work orders, Safe Work Method Statements (SWMS), or site plans. Always clarify any confusing instructions with your supervisor before you start. Ask the group: 'Why is it crucial to confirm instructions before you start?' This ensures you, your supervisor, and your colleagues all have the same understanding of the task. (Covers 1.1, 1.2, PE7, FS1). Timing: ~10 mins.

Hazard Identification and Control

- Spotting potential hazards (e.g., pedestrians, obstacles)
- Assessing risks (likelihood and consequence)
- Using the hierarchy of control
- Implementing control measures
- Considering environmental issues (spills, noise)

SPEAKER NOTES

A hazard is anything with the potential to cause harm. A risk is the likelihood of that harm occurring. We use the hierarchy of control to manage risks. From most to least effective, it's: Elimination, Substitution, Engineering controls, Administrative controls, and finally, PPE. We must also consider our impact on the environment, like preventing spills or minimising noise. (Covers 1.3, KE1). Timing: ~15 mins.

Personal Protective Equipment (PPE)

- Why PPE is the last line of defence
- Selecting the right PPE for the task
- Common forklift operator PPE
- Checking PPE is in good condition
- Wearing and storing PPE correctly

SPEAKER NOTES

PPE is your last line of defence, used when other controls can't eliminate the risk. For forklift operations, this typically includes high-visibility clothing and steel-capped boots. Your site's policies will dictate the specific requirements. Always inspect your PPE for damage before use and store it correctly. (Covers 1.4, PE8, KE1). Timing: ~10 mins.

Forklift Attachments and Capacity

- Identifying approved attachments
- Understanding the data plate/load chart
- How attachments affect stability and capacity
- Complying with operating capacities
- Never use unapproved or damaged attachments

SPEAKER NOTES

Every forklift has a data plate, or load chart, that tells you its maximum lifting capacity at different load centres. Adding an attachment like fork slippers or a jib will change—usually reduce—that capacity. You must understand how to read the plate and account for any attachments to prevent overloading, which can lead to tipping. (Covers 1.5, PE6, KE3, FS2). Timing: ~15 mins.

Site Communication

- Coordinating with other workers and plant
- Using two-way radios
- Understanding hand signals
- Maintaining eye contact with spotters
- Reporting your movements clearly

SPEAKER NOTES

Clear communication is vital for safety. You need to coordinate your movements with pedestrians, other vehicle operators, and spotters. This can be done using two-way radios, horns, and standard hand signals. Always make positive eye contact to confirm signals are understood. Let's practice a few common hand signals now. (Covers 1.6, PE14). Timing: ~10 mins.

KNOWLEDGE CHECK

Check Your Understanding

- Where do you find the forklift's lifting capacity?
- What is the first step in the hierarchy of control?
- Name two common hazards in a forklift operating area.
- Why must you communicate with others on site?

SPEAKER NOTES

Let's quickly review. Ask questions to the group. Expected answers: 1. On the data plate or load chart. 2. Elimination—removing the hazard completely. 3. Pedestrians, blind corners, uneven surfaces, overhead obstructions. 4. To ensure everyone's safety and to coordinate work activities efficiently. (Covers E1). Timing: ~5 mins.

SECTION

Session 2 — Safe Forklift Operation

- Conducting pre-start and post-op checks
- Operating the forklift safely
- Lifting, moving, and placing loads
- Monitoring the work area
- Parking and shutting down correctly

SPEAKER NOTES

Now we move into the practical side of things. This session covers the complete operational cycle, from the moment you approach the machine to when you park it at the end of your shift. We will focus on the techniques and awareness needed to operate safely and efficiently. (Covers Element 2). Timing: ~5 mins.

Pre-Start Checks

- Using a pre-start checklist
- Visual inspection (tyres, forks, mast, guards)
- Checking fluid levels (oil, fuel, coolant)
- Testing controls, horn, and lights
- Reporting any faults found

SPEAKER NOTES

Every shift must begin with a thorough pre-start check using a checklist. This involves a walk-around visual inspection, checking fluids, and testing all functions like brakes, steering, and warning devices. If you find any fault, the machine must be tagged out of service and the issue reported immediately. Never operate a faulty forklift. (Covers 2.1, 2.2, PE2, PE11, KE3). Timing: ~15 mins.

Operating the Forklift

- Correct start-up and warm-up procedure
- Maintaining 3 points of contact
- Smooth and controlled movements
- Understanding the stability triangle
- Keeping forks low when travelling
- No passengers allowed!

SPEAKER NOTES

When getting on or off, always maintain three points of contact. Operate all controls smoothly—no jerky movements. A key concept is the 'stability triangle'; keeping the combined centre of gravity within this triangle prevents tipping. When travelling, keep the load low and tilted back. And remember, forklifts are designed for one person only—the operator. (Covers 2.4, PE3, KE3). Timing: ~15 mins.

ACTIVITY

Practical: Pre-Start Check

- In small groups, get a pre-start checklist.
- Go to the assigned forklift.
- Conduct a full pre-start check.
- Identify and document any 'faults' planted by me.
- Report your findings back to the group.

SPEAKER NOTES

Time to put theory into practice. I'll divide you into small groups. Each group will get a checklist and be assigned a forklift. I've placed some minor, safe 'faults' on each machine. Your job is to find them, document them correctly on the checklist, and explain what the proper procedure would be. I will be supervising at all times. (Covers 2.1, 2.2, PE2, PE11). Timing: ~25 mins.

Handling Loads Safely

- Assessing the load (weight, size, stability)
- Positioning the forks correctly
- Lifting the load smoothly
- Tilting the mast back for travel
- Placing the load securely
- Using attachments correctly

SPEAKER NOTES

Before lifting, assess the load. Is it stable? Is it within your forklift's capacity? Approach the load squarely and ensure forks are spread wide and fully inserted. Lift, then tilt back. When placing the load, ensure it's stable and secure before backing away. We'll also cover the correct procedures for fitting and removing attachments. (Covers 2.3, 2.4, 2.6, PE4, PE6). Timing: ~20 mins.

Monitoring Your Environment

- Constantly scanning the work area
- Anticipating traffic flow
- Choosing the safest, most efficient route
- Watching for pedestrians and other vehicles
- Responding to alarms and warning systems
- Maintaining a safe following distance

SPEAKER NOTES

Situational awareness is critical. You must constantly be scanning your surroundings—looking for pedestrians, other vehicles, and potential hazards. Use your horn at intersections and blind corners. Listen for any warning alarms from your machine and know what they mean. Always choose the safest route, even if it's not the shortest. (Covers 2.5, 2.7, 2.8, PE9, PE10, PE12). Timing: ~15 mins.

Parking and Shutdown

- Parking in designated, safe areas
- Lowering the forks to the ground
- Applying the park brake
- Neutralising controls
- Turning off the engine and removing the key
- Conducting a post-operational inspection

SPEAKER NOTES

The shutdown procedure is just as important as the pre-start. Park on level ground in a designated area, away from traffic. Lower the forks fully to the ground to prevent a trip hazard. Apply the park brake, put the controls in neutral, turn off the engine, and remove the key. Finally, do a quick post-op inspection to check for any damage that occurred during your shift. (Covers 2.9, PE2, PE5). Timing: ~10 mins.

KNOWLEDGE CHECK

Check Your Understanding

- How high should your forks be when travelling with a load?
- What is the 'stability triangle'?
- What should you do if you find a fault during a pre-start check?
- List three steps of the shutdown procedure.

SPEAKER NOTES

Time for another quick check. Ask questions to the group. Expected answers: 1. As low as possible while clearing the ground (approx. 150mm), with the mast tilted back. 2. The area between the front wheels and the rear axle pivot point that contains the forklift's centre of gravity. 3. Do not operate it. Tag it out of service and report it according to workplace procedures. 4. Any three of: Park on level ground, lower forks, apply park brake, neutralise controls, turn off engine, remove key. (Covers E2). Timing: ~5 mins.

SECTION

Session 3 — Post-Operational Activities

- Maintaining a clean and safe work area
- Managing and reporting hazards
- Completing required documentation
- Reviewing key course concepts

SPEAKER NOTES

Welcome to our final session. The job isn't finished when you turn the engine off. This session covers the essential wrap-up activities: housekeeping, hazard reporting, and paperwork. These steps ensure the work area is safe for the next person and that there's a clear record of your work. (Covers Element 3). Timing: ~5 mins.

Housekeeping

- Why good housekeeping is important for safety
- Clearing the work area of debris
- Disposing of waste correctly (e.g., pallets, shrink wrap)
- Recycling materials where possible
- Storing equipment and materials properly

SPEAKER NOTES

A tidy workplace is a safe workplace. Good housekeeping reduces trip hazards, fire risks, and allows for efficient movement of people and plant. At the end of your task, clear away any rubbish like broken pallets or plastic wrap, and dispose of it according to your site's procedures. (Covers 3.1, KE1). Timing: ~10 mins.

Reporting and Documentation

- Reporting any new hazards identified
- Completing pre-start checklists
- Filling out logbooks or shift reports
- Recording maintenance issues
- Filing documents as per workplace procedures

SPEAKER NOTES

Accurate records are a legal requirement and a key part of a safe workplace. This includes your completed pre-start checklist, a logbook of operations, and any fault or hazard reports. Ensure your writing is clear and you file the documents in the correct place so others can access them. (Covers 3.2, 3.3, PE13). Timing: ~10 mins.

ACTIVITY

Activity: Scenario Debrief

- Read the provided work scenario.
- Identify the potential hazards.
- Describe the steps you would take from start to finish.
- What documentation would you need to complete?
- Discuss your plan with your group.

SPEAKER NOTES

Let's bring it all together. I'm giving each group a short work scenario. Your task is to plan the job from start to finish, considering everything we've learned: hazard identification, controls, communication, safe operation, and documentation. After 15 minutes, we'll come back together and each group will present their plan. (Covers all Elements). Timing: ~20 mins.

SUMMARY

Course Summary and Next Steps

- Plan every job: check docs, assess risks, use PPE.
- Always do your pre-start and post-op checks.
- Operate smoothly and be aware of your surroundings.
- Handle loads within the forklift's capacity.
- Keep the site tidy and complete your paperwork.
- Next step: Practical assessment.

SPEAKER NOTES

That brings us to the end of the training. We've covered planning, checking, operating, and cleaning up. The key message is to always think about safety first. The next step is your assessment, which will include a knowledge test and a practical demonstration where you'll operate the forklift to complete a work task. I'll now explain the assessment process in detail. Are there any final questions? (Covers all Elements, PE, KE, Assessment Conditions). Timing: ~10 mins.